SEC Local Office

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*Staff should review all parked tasks the first thing each morning to ascertain if any may be completed.
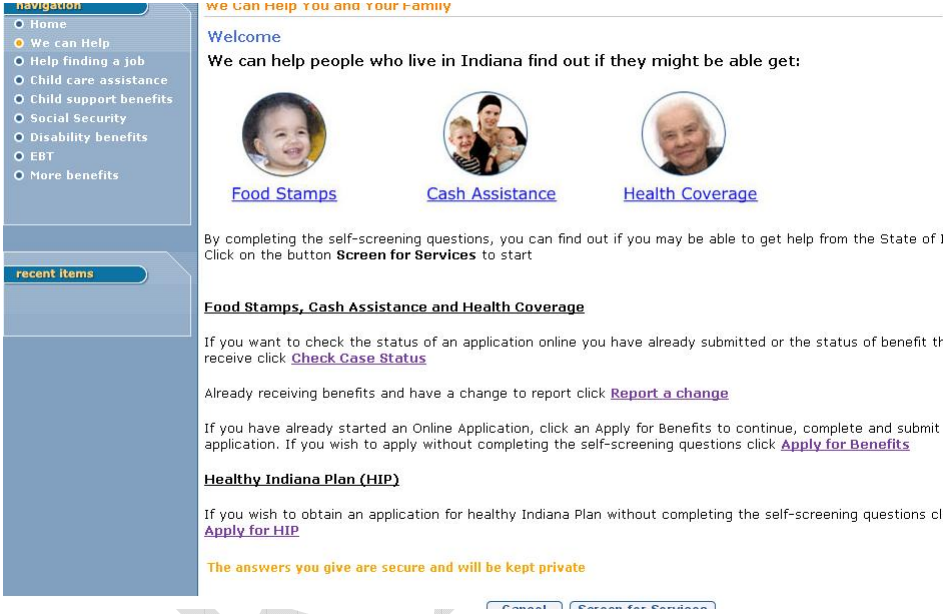

APPLICATION REQUEST

Application processing can be initiated by:

1. Accessing and completing the On-line application through the FSSA Website and submitting the signature page by mailing/faxing it to the Document Center/Local Office.
2. Calling 1-800-403-0864 and requesting that an application be mailed.
3. Calling 1-800-403-0864 and completing a screening with the Call Center. If eligible for expedited service, a next day interview appointment will be scheduled at the Local Office in the applicant's county of residence.
4. Submitting a paper application to the Local office or by sending an application by mail/fax to the Document Center.
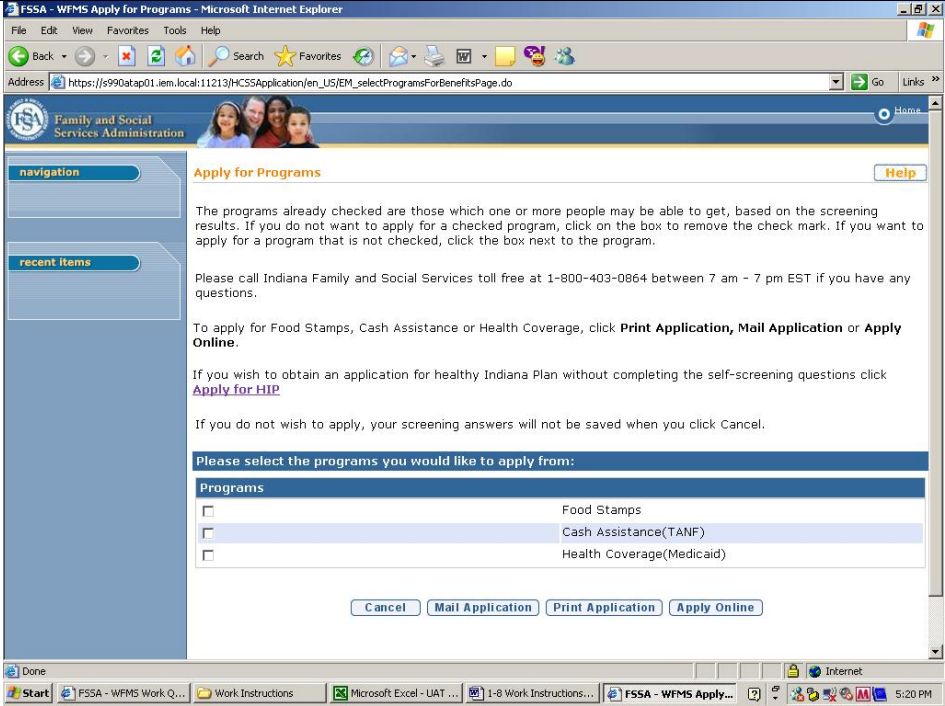

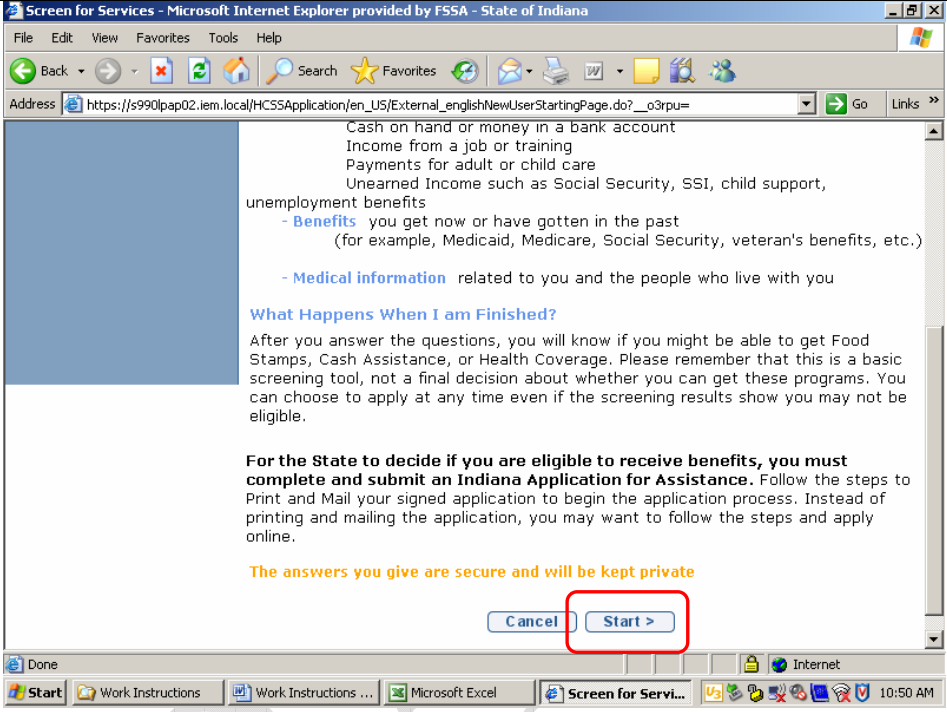**1.0 Assisting the Applicant with Screening and/or Application Upon Request**

If client is unable to complete the application and/or screening without assistance and requests help from Local Office staff, staff should follow the online instructions with the client to aid in the completion of the screening and/or application. Below is a guide when assisting the client.
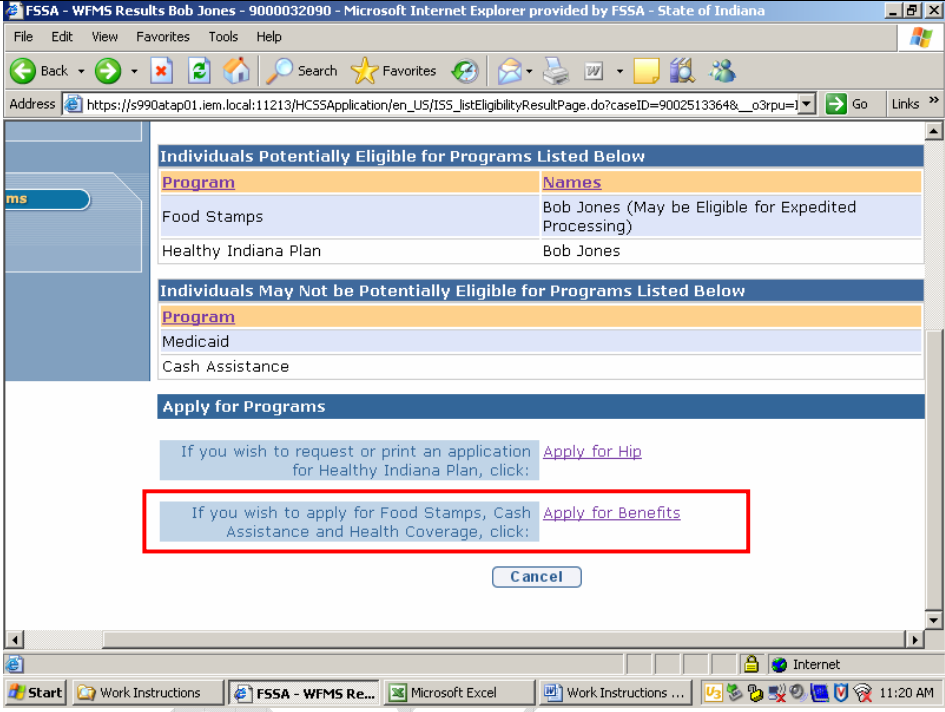
Step	Assisting the Applicant with Screening and/or Application Upon Request
1.	Applicant will select "Start Here" for the English version or "Version en Espanol for the Spanish version.

Step	Assisting the Applicant with Screening and/or Application Upon Request
2.	From the *Welcome* page the applicant may select either the "**Apply for Benefits**" link to bypass the screening or the "**Screen for Services**" button.

Step	Assisting the Applicant with Screening and/or Application Upon Request
3.	**Print Application**:

If the applicant is unwilling/unable to complete the screening and chooses the "Apply for Benefits" link.

Food Stamps   Cash Assistance   Health Coverage

By completing the self-screening questions, you can find out if you may be able to get help from the State of Indiana. Click on the button **Screen for Services** to start

Food Stamps, Cash Assistance and Health Coverage

If you want to check the status of an application online you have already submitted or the status of benefit that you receive click **Check Case Status**

Already receiving benefits and have a change to report click **Report a change**

If you have already started an Online Application, click an Apply for Benefits to continue, complete and submit that application. If you wish to apply without completing the self-screening questions click **Apply for Benefits**

Healthy Indiana Plan (HIP)

If you wish to obtain an application for healthy Indiana Plan without completing the self-screening questions click **Apply for HIP**

The answers you give are secure and will be kept private

[Cancel]   [Screen for Services]

They would indicate the program(s) for which they wish to apply and select the "Print Application" button.

Step	Assisting the Applicant with Screening and/or Application Upon Request
	Then complete the name and address fields and click on the "Print Application" button. Then click on the "Finish" button. When the actual application appears they should click on the printer icon in the upper left hand corner of the screen. The applicant should then sign at least Section A General Information page one of the application and submit it to protect their application date, or manually complete all hard copy pages and submit the completed application.
4.	**Applicant chooses "Screen for Services".** The applicant should select the "Start" button.

Step	Assisting the Applicant with Screening and/or Application Upon Request
5.	The applicant should navigate through the Screening Tool. Screening will be completed when the "*Results*" screen appears. Note: not all questions require a response, and if applicant prefers not to respond to a particular question, they may continue to the next screening page by selecting the "Next" button.
6.	Applicant reviews the *"Results"* screen. If the applicant wishes to apply for assistance they should select the "*Apply for Benefits"* button.

Step	Assisting the Applicant with Screening and/or Application Upon Request

7.	The system navigates to the *"Apply for Programs"* screen. **Apply for the Selected Programs** Programs ☐ Food Stamps ☑ Cash Assistance (TANF) ☐ Health Coverage (Medicaid) 〔 Cancel 〕 〔 Print Application 〕 〔 Mail Application 〕 〔 **Apply Online** 〕 The applicant should confirm/indicate which program(s) they are interested in applying for by clicking the appropriate *checkbox* next to each program.
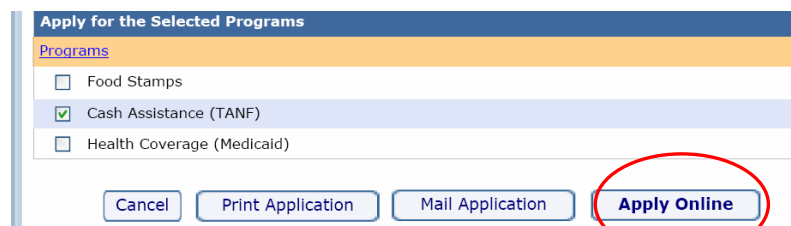
8.	**Applicant chooses to apply online.**
	If the applicant chooses the option to apply online they may click on the "*Apply Online*" button*.*
	If the applicant selects *"Apply Online"* the system will display the *Print Application* page. They should complete the page; select the *"Apply Online"* and "*Finish*" buttons to complete the online application.
	Print or write down the Confirmation Number, in case, the applicant will need to return to the online application at a later time to complete or change an unfinished application prior to submitting.

Print Application

Please enter the following information including the name and address for the person who is applying.

Note: All items marked with a (*) need to be answered to complete screening.

Application's Personal Information

*First Name:	
Middle Initial:	
*Last Name:	
Date of Birth(MM/DD/YYYY):	
Sex:	Female
Returning User? Enter confirmation Number:	

Applicant Address

*Address1:	
Address2:	
Apartment:	
*City:	
*State:	Indiana
*Zipcode:	

[< Back to Previous] [Cancel] [Apply Online]

9.	Then complete the "*Indiana Application for Assistance*" driver that appears. [< Back] [Continue with the Application] [Apply Now]

10.	After completing the "*Indiana Application for Assistance*" the "*Finish Application Request*" page will appear. The Number to appear on this page will be used as the *Application Case* number. **Finish Application Request** Thank you for requesting to apply for Services with the Family Social Services Administration (FSSA) for the S Indiana. Please review the Application information you have supplied to us and print the Application by selectin Print Application button below. If you would prefer to receive your application via the mail, please click the Se the Application button below. The instructions for submitting your application is contained in the packet produced when you either select to receive the application via the mail; however, you may review the instructions online if you prefer by selecting review the instructions link above or by clicking the option on the Navigation Menu on the left side of your s Please remember the Confirmation number for further communications or questions or to track your application Family and Social Services Administration (FSSA). Confirmation Number: 9000037724 You will have 30 days from the time you applied on-line or until we receive your application to use this confirm number to modify your application request. If you have any questions, please call us toll free at 1-800-403-0864 between 7am - 7pm.
11.	From the "*Finish Application Request*" screen the applicant will have a choice to "*Print Application*" or "*Send me the Application*". The applicant would review the hard copy application, sign, and submit by fax, mail or to the local office. An Application Document Cover Sheet is printed with the application to accompany any documents that are sent separately. **Print Application** Choosing this option will download a PDF (Portable Document Format) file on your machine. You will be able to this file using Acrobat Reader and print it to your local printer. Generation of this file might take several minut [Print Application] **Receive Application via Mail** Please select one of the following location(s) where you will like this application mailed and then click the Ser Application button. [Send me the Application]
12.	**Applicant chooses to "Print Application" bypass screening and the online application.** If the applicant chooses the option to print the application, click on the *"Print Application" button.*
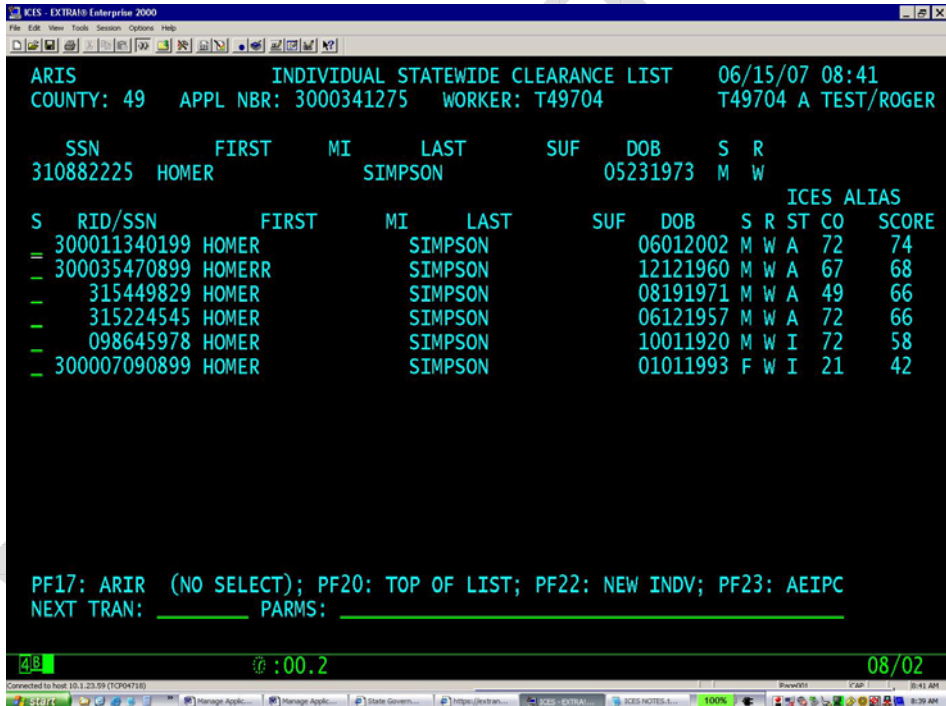
13.	If the applicant selects *"Print Application"* the system will display the "*Information needed to send to Family Assistance Office*" page. They should complete the page; select *"Print Application"* and *"Finish"* to print the bar coded application. The applicant should sign and submit the application to the local office. An Application Document Cover Sheet is printed with the application to accompany any documents that are mailed/faxed separately.
14.	**Application submitted to the Local Office.**

The Local Office will date stamp the documents upon receipt. If Food Stamps are chosen, the application must be screened for expedited service by reviewing the expedite questions completed on the application.

If the applicant is not expedited the application and the Application Document Cover Sheet with any verifications provided will be faxed to the Document Center immediately. The applicant will receive a scheduling notice in the mail, if an interview is required.

If the applicant is expedited the Local Office staff will schedule an appointment for the same or following business day and provide the applicant with a "*Notice of Interview-Appointment*" before they leave the office. *Note*: if the interview is scheduled for the following business day the hard copy application should be retained in the office until the scheduled appointment time. |
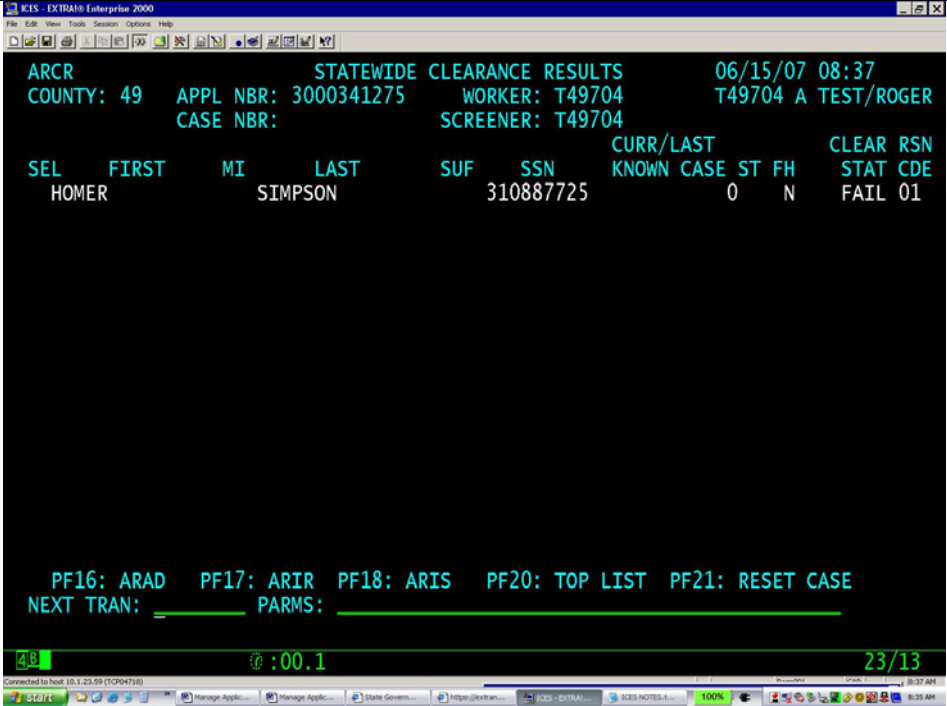
2.0 Scheduling an Expedited Application Received at a Local Office
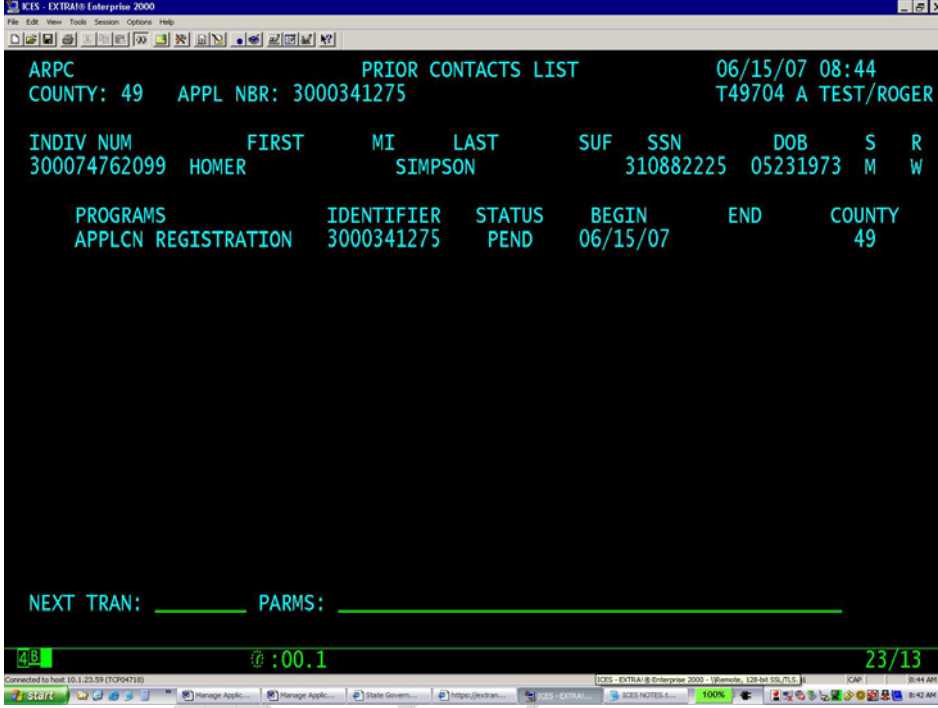
If yes to Food Stamps and expedited interview, the application should be processed at the Local Office. If not, the application should be faxed to the document center immediately (same day it's received) for processing.

Steps	Scheduling an Expedited Application Received at a Local Office
1.	**Search results show *Case Type:*** REFER TO (INSERT HYPERLINK) SEARCH INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4.6 Search for the applicant in WFMS to determine if the submitted application may be a duplicate and/or the applicant's "*Status*". The status of an applicant's application (ex: **5**000000000) or case (ex: **1**000000000) will appear in the last column of your search results. Case Type - Screening or Application **Application** ✓ If after the search of WFMS is made and there is a current application for the applicant with a "*Status*" indicator which is blank, click on the "*Case Number*" link to go to the "*Application Case Home*" page to verify the status. ⊕ If the application has a status of "*Submitted Online*", complete the following. (*Note: an application with a Submitted Online status will not allow you to push information through AR into ICES. Therefore, the application's status must be changed to "*Submitted-Valid*".) ▪ From the "*Application Case*" *Home* page, • Click on Members in the Left Navigation. Enter all member information required to successfully complete AR in the data fields including program choice(s), the applicant's Date of Birth, gender and click on Save at the bottom of the screen. *Note: **ALL members must be entered into the WFMS before Send to AR is selected**. Otherwise, clearance issues may arise. ▪ Click on Home in the Left Navigation to return to the "*Application Case*" *Home* page, • Click on the "*Edit*" button at the top • On the "*Modify Application Case*" page change the "*Application Status*", by clicking on the drop down box and selecting "*Submitted-Valid*" • Add the township information • Enter preferred language • Note the type of health coverage if Medicaid is requested and • Click on "*Save*" which will return you to the "*Application Case Home*" page **Standard** • If the application has a Status of "*Pending*", click on the "*Case Number*" link to access the "Application Case Home" page. If after the search of WFMS is made and the current application has a Status of "*Open/Conditional*", schedule

Steps	Scheduling an Expedited Application Received at a Local Office
	the appointment and reference section **5.0 Add a Program Applicant Keeps In-Office Scheduled Appointment** below for instructions to process the application. • Schedule an interview(s) on **CSOAS – Client Scheduling Appointment Scheduler** following expedited scheduling rules, the applicant will be scheduled for the same or next business day. **Screening** If the search results show the *CaseType* is *Screening* and the client is submitting a completed hard copy application, the Application Case has not been created in WFMS. • Create the Application Case by clicking on "*Create Application Case*" from the User Home page. • Follow Steps 6 – 12 of **3.0 Applicant Keeps Scheduled Appointment (INSERT HYPERLINK TO SECTION 3.0 STEP 6)** to create the WFMS Application Case prior to scheduling. .
2.	From the *Application Case Home page*, under the *Options* cluster, click *Send AR Information to ICES*. Edit message will appear. Click on Close. **Options** Send AR Information to ICES
3.	Navigate to ICES. Enter TRAN: ARLD; PARMS: WFMS Application Number.
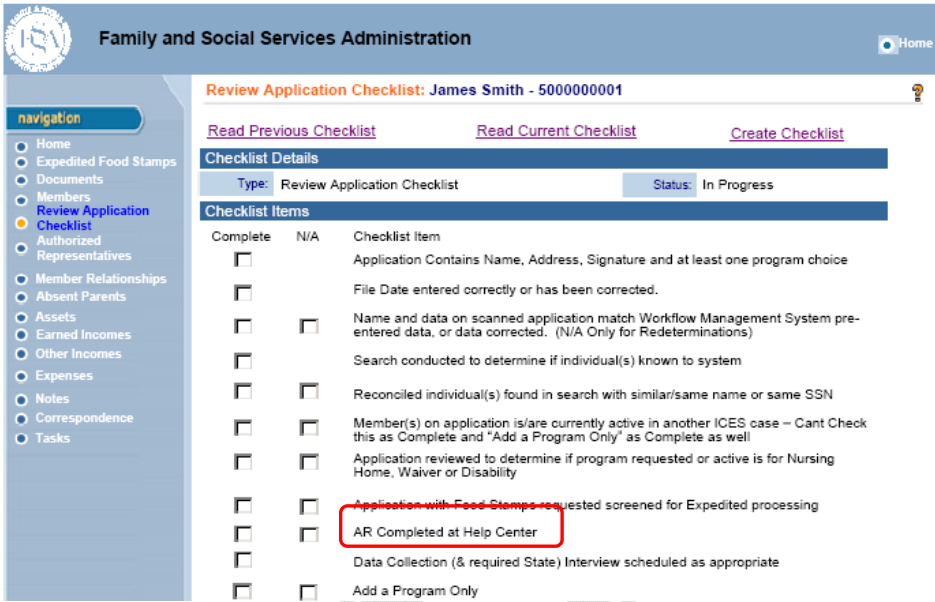
Steps	Scheduling an Expedited Application Received at a Local Office
	NEXT TRAN: ARLD PARMS: 9000229082 The WFMS will attempt to push all of the application information through the AR driver flow in ICES. When the AR data has successfully been entered into ICES, the message, "AR LOAD COMPLETE" will appear. The ICES application number will display in the TRAN field if WFMS successfully pushes all data through AR. **Take note of the ICES application number for scheduling purposes.**
4.	Complete screen **ARIS – Individual Statewide Clearance List,** if necessary. For an exact match, place an "X" in the select column and hit ENTER. The next individual will display and the same process is repeated until all individuals have been cleared.
5.	Complete screen **ARCR – Statewide Clearance Results**, if necessary. If an individual is known to ICES, use the inactive case number containing the most current/correct information. Reset the case number on ARCR if a more appropriate case number is available. A listing of File Clearance Failure Reason Codes can be accessed by entering TRAN: RFDI; PARMS: TSCF.

Steps	Scheduling an Expedited Application Received at a Local Office

REFER TO (INSERT HYPERLINK) CREATE A TASK
Volume 7 Common Processes – Section 3.11.1.2 |
| **6.** | Duplicate Rid: should a duplicate RID be discovered, a *User Defined* task with a same day deadline will need to be created and sent to the "Problem Resolution" queue to resolve the duplicate RID. REFER TO CREATE A USER DEFINED TASK (INSERT HYPERLINK) SECTION 3.11.1.3.

The application should be retained, notes entered into WFMS (if CLRC not available) detailing the events and an appointment to interview the applicant should be scheduled (see Step 13 & 14) for two business days in the future, if unable to continue. |
| **7.** | View screen **ARPC – Prior Contacts List**, if necessary. |

Steps	Scheduling an Expedited Application Received at a Local Office
| | ```
ICES - EXTRA® Enterprise 2000
File  Edit  View  Tools  Session  Options  Help

ARPC                    PRIOR CONTACTS LIST            06/15/07 08:44
COUNTY: 49   APPL NBR: 3000341275                      T49704 A TEST/ROGER

INDIV NUM        FIRST      MI    LAST       SUF   SSN        DOB      S   R
300074762099  HOMER              SIMPSON           310882225  05231973  M   W

      PROGRAMS              IDENTIFIER   STATUS    BEGIN       END      COUNTY
      APPLCN REGISTRATION   3000341275   PEND      06/15/07             49


NEXT TRAN: _____  PARMS: _____
``` |
| **8.** | Complete/review screen **ARCP – Choice of Programs**, if necessary for all household members. |

Steps	Scheduling an Expedited Application Received at a Local Office
|  | ```
ICES - EXTRA! Enterprise 2000

ARCP                    CHOICE OF PROGRAMS              06/15/07  08:45
COUNTY: 49    APPL :  3000341275    WORKER: T49704      T49704 A TEST/ROGER
LAST ACTIVITY DATE:  06/15/07       STATUS: PEND
ALL LISTED INDIVIDUALS APPLY FOR CASH, MEDICAL, FS:    _


INDIVIDUAL    CASH,MEDICAL,FS    CASH   MEDICAL    FS     MA ENROLL
  1 HOMER S          _            N       Y       N         N














NEXT TRAN: _____  PARMS: _____

4B              :00.1                                      07/51
``` |
| **9.** | Complete screen **ARAS – Application Screening**, if not already completed.

ARAS   APPLICATION SCREENING   09/27/07 13:13

 COUNTY: 72   APPL NBR: 3000136527   WORKER: W99181 T
TEST/HEWET

 APPL DATE: 07/02/03   STATUS: CA   SCREENER: DNT052

 1. IS ANY INDIVIDUAL A MIGRANT OR SEASONAL FARM WORKER? N

   IF YES,

   WILL YOU RECEIVE INCOME FROM YOUR FORMER EMPLOYER AFTER
TODAY? N

   WILL YOU RECEIVE MORE THAN $25 INCOME FROM YOUR NEW
EMPLOYER

     WITHIN 10 DAYS? N

   WILL YOUR LIQUID RESOURCES, SUCH AS CASH, CHECKING/SAVINGS,
BE $100

     OR LESS? Y |

Steps	Scheduling an Expedited Application Received at a Local Office
	2. ARE YOUR MONTHLY RENT/MORTGAGE AND UTILITIES MORE THAN YOUR GROSS MONTHLY INCOME AND LIQUID RESOURCES? Y 3. IS YOUR GROSS MONTHLY INCOME LESS THAN $150? Y 4. ARE YOUR LIQUID RESOURCES,SUCH AS CASH CHECKING/SAVING ACCOUNTS, $100 OR LESS? Y B65 - EXPEDITE FOOD STAMP INTERVIEW
| **10.** | Schedule an interview(s) on **CSOAS – Client Scheduling Appointment Scheduler** following expedited scheduling rules, the applicant will be scheduled for the same or next business day.<br><br>Reminder to use PF17 to search the next appointment when applicant declines the first available appointment.<br><br>```
CSOAS                      CLIENT SCHEDULING          07/20/07 07:10
                  OFFICE APPOINTMENT SCHEDULER        97JCAR J TEST/CARTW

   CASE/APPL NBR: _____   CURAM NBR: 7123445667  RECIPIENT NBR: _____
   ACTIVITY CODE: 11         INTERVIEW METHOD : O    BEGIN DATE: _____
 OFFICE LOCATION: 72000      ZIP CODE (OFFICE): _____
    CLIENT NAME: _____ - _____ ___
   ADDRESS LINE1: _____
   ADDRESS LINE2: _____
           CITY: _____   STATE: __  ZIP: _____
 -----------------------------------------------------------------------

   OFFICE CODE:
       LOCATION:                           ACTIVITY CODE:
                                        APPOINTMENT DATE:
                                        APPOINTMENT TIME:


 -----------------------------------------------------------------------
   PF15: CONFIRM APPOINTMENT              ENTER: FIND NEXT APPOINTMENT
   PF16: CONFIRM APPOINTMENT (LOG IN)     PF17 : FIND NEXT APPOINTMENT (REFUSAL)

 NEXT TRAN: _____  PARMS: _____
 040 - REQUIRED FIELDS NOT ENTERED
``` |
| **11.** | From the Left Navigation click on Correspondence to provide the applicant with a Notice of Interview/Appointment.

REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE IN
 Volume 7 Common Processes Send Notice – Section 3.11.4.3 |

Steps	Scheduling an Expedited Application Received at a Local Office
	Create Correspondence **CorrespondenceDetails – Addressee** Addressee Type: Third Party **If Address Type is Participant, select the Member Name** Addressee Name: **If Address Type is Third Party or Authorized Representative** Addressee Name: **Enter Address Details for Third Party or Authorized Representative. Information is optional for Pa** Address Line 1: Address Line 2: City: State: Zip: **Select The Participant This Correspondence Is In Regards To** Member Name: LAURA BUSH Save Cancel
12.	Left click on Home in the Left Navigation and under the *Options* cluster, click *Completed AR in ICES*. Then left click on Close. **Options** Completed AR in ICES
13.	From the Left Navigation click on *Review Application Checklist* to complete the checklist indicating "*AR Completed at Help Center*". Then left click on Save.

Steps	Scheduling an Expedited Application Received at a Local Office
14.	Left click on Home in the Left Navigation and click *Notes* from the Left Navigation. The WFMS will navigate to the *Notes Page*.
15.	Click *New*. The WFMS will navigate to the *Create Note Page*.
16.	Enter case notes regarding the application and any actions taken (i.e. appointments scheduled and missed, information modified, information pertinent to processing the application, applicant declining first available appointment etc.). Click on Save.
17.	Click *Home* from the *Left Navigation*. The WFMS will navigate to the *Application Home Page*.

3.0 Applicant Keeps In-Office Scheduled Appointment
The applicant may have been scheduled by either the Call Center or Local Office staff, 1) due to being entitled to an expedited food stamp appointment, 2) because they have no telephone or 3) because they requested an in-office interview. All scheduled appointments for the Local Office are displayed on CSODA. *Local Office staff should view CSODA periodically throughout the day as additional appointments may be added.*

Note: Every application must have a WFMS application case created

Steps	Applicant Keeps Scheduled Appointment
1.	REFER TO (INSERT HYPERLINK) SEARCH INSTRUCTIONS Volume 7 Common Processes – Section 3.11.3.6 A signed copy of the following must be submitted to the local office, or viewable in WFMS, before a non-redetermination Food Stamp interview takes place in the local office. - The last page of the "Notice Regarding Rights & Responsibilities" indicating that the applicant has received and understands the "Notice Regarding Rights & Responsibilities". - Section A of the "Indiana Application for Assistance" indicating the applicant's name, address and program choice. - Section D of the "Indiana Application for Assistance" indicating the applicant's Authorized Representative(s), if applicable. - Section L of the "Indiana Application for Assistance" indicating the applicant's Assignment of Rights (if applicable), their agreeing to Food Stamp Work Registration rules (if applicable) and/or Voter Registration choice. Search for the applicant in WFMS to determine their status. ✓ If after a search of WFMS is made and the applicant's "*AG/Case Type*" appears as "*Standard Case*" and <u>all</u> of the above signature pages have been submitted (hard copies available or documents viewable in WFMS), reference section **5.0 Add a Program Applicant Keeps In-Office Scheduled Appointment** (INSERT HYPERLINK) below for instructions to process the application. . If the application is viewable in documents and the signatures listed above have not been obtained print the application and obtain signatures. ✓ If after a search of WFMS is made and the applicant's "*AG/Case Type*" appears as "*Application Case*" and the above signature pages have been submitted (hard copies available or documents viewable in WFMS), begin at Step 25 below. If the application is viewable in documents and the signatures listed above have not been obtained, print the application and obtain signatures. ✓ If after a search of WFMS is made and the applicant's "*AG/Case Type*" appears as "*Screening Case*" begin at Step 2 below to create and print a hard copy application for signature/submission**;** and to create an application in WFMS. ✓ If after a search of WFMS is made and the applicant has no record, begin at Step 2 below to create and print a hard copy application for signature/submission**;** and to create an application in WFMS. ✓ If after a search of WFMS is made and the applicant has no record or appears as "Screening Case" and the above signature pages have been submitted to the Local

	Office , from the *User Home* page click on *Create Application*. WFMS will navigate to the *Application Case Home* page. Continue at step 6 below.
2.	From the "*FSSA User Home*" page, under *My Shortcuts* click on *Apply Now*. The WFMS will navigate to the *Apply for Programs* page.
3.	Select the program(s) for which the applicant wishes to apply and click on *Print Application* at the bottom of the page. WFMS will navigate to the *Information needed to Send to Family Assistance Office* page.
4.	Complete the required fields on the page and click on *Print Application* at the bottom of the page to print an application for signature/submission and then close the window that appears.
5.	WFMS will navigate back to the *Information needed to Send to Family Assistance Office* page. Click on *Create Application* at the bottom. WFMS will navigate to the *Application Case Home* page.
6.	On the Application Case Home page click on Members in the Left Navigation.
7.	The Members page for the applicant will appear. Click on Edit.

8.	The Modify Member screen will appear. Enter all information required to successfully complete AR in the data fields including program choice(s), the applicant's Date of Birth, gender and click on Save at the bottom of the screen. *Note: **ALL members must be entered into the WFMS before Send to AR is selected**. Otherwise, clearance issues may arise.

| **9.** | The Members page will reappear. If additional members need to be added, click on the Add Member button near the top of the page. |

10.	The Add Member page will appear allowing an additional member to be added to the application in WFMS. After the addition of an individual click on the Add button at the bottom of the screen. Remember to include the date of birth, gender and program(s) for which additional individuals are applying.

11.	Left click on Home in the Left Navigation.
	The WFMS will navigate back to the *Application Case Home* page.
12.	On the Application Case Home page,
	▪ Click on the Edit button at the top
	▪ On the Modify Application Case page change the "Application Status", by clicking on the drop down box, to "Submitted-Valid"
	▪ Add the township information
	▪ Delete any X's that may appear inappropriately in fields
	▪ Enter language preference
	▪ Note the type of health coverage if Medicaid is requested
	▪ Click on save which will return you to the Application Case Home page
	Note: For a recipient who has no fixed address, specific arrangements must be made with him regarding the issuance of his FSSA correspondence. FSSA correspondence will be mailed to the address specified by the recipient, such as:
	The local office;
	A friend or relative;

	Social service agency; Church; or Shelter for the homeless. SKIP TO SECTION 5.0 FOR ALL ADD A PROGRAM CASES (INSERT HYPERLINK TO SECTION 5.0 ADD A PROGRAM/AG KEEPS SECHEDULED APPOINTMENT)
13.	From the *Application Case Home page*, under the *Options* cluster, click *Send AR Information to ICES*. Then left click on Close. **Options** Send AR Information to ICES
14.	Navigate to ICES. Enter TRAN: ARLD; PARMS: WFMS Application Number. **NEXT TRAN: ARLD PARMS: 9000229082** The WFMS will attempt to push all of the application information through the AR driver flow in ICES. When the AR data has successfully been entered into ICES, the message, "AR LOAD COMPLETE" will appear. The ICES application number will display in the TRAN field if WFMS successfully pushes all data through AR. **Take note of the ICES application number for scheduling purposes.** Should all data be successfully pushed, go to Step 17. If not, go to Step 12.
15.	Complete screen **ARIS – Individual Statewide Clearance List,** if necessary. For an exact match, place an "X" in the select column and hit ENTER. The next individual will display and the same process is repeated until all individuals have been cleared.

```
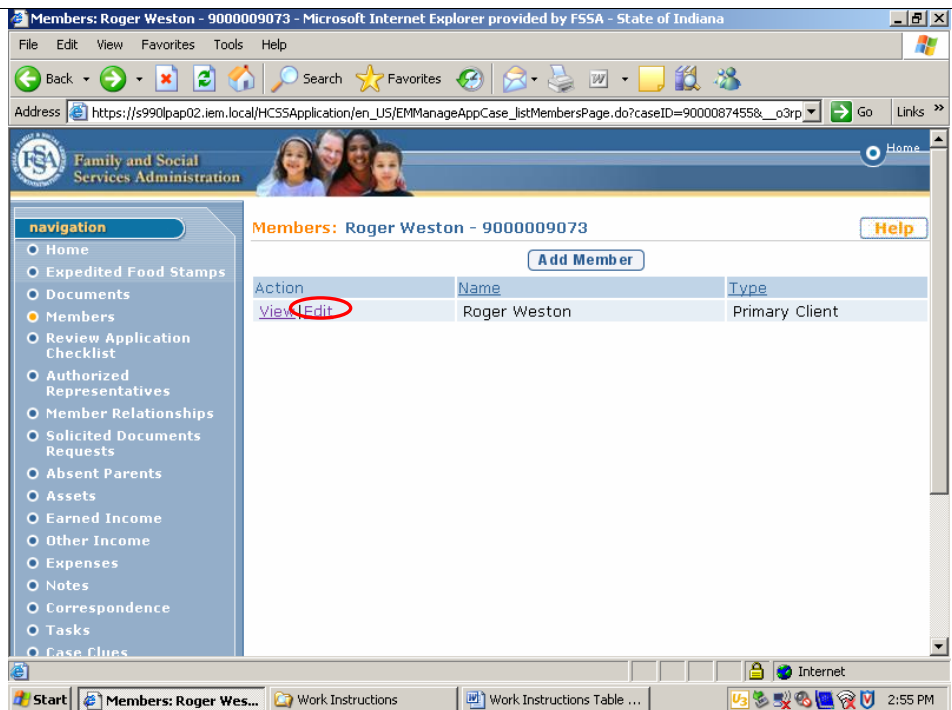ICES - EXTRAN Enterprise 2000                                              _ 8 X
File Edit View Tools Session Options Help

ARIS                 INDIVIDUAL STATEWIDE CLEARANCE LIST      06/15/07 08:41
COUNTY: 49     APPL NBR: 3000341275   WORKER: T49704         T49704 A TEST/ROGER

   SSN         FIRST      MI      LAST       SUF      DOB     S  R
310882225  HOMER              SIMPSON               05231973  M  W
                                                               ICES ALIAS
S   RID/SSN        FIRST     MI     LAST        SUF    DOB    S R ST CO   SCORE
_ 300011340199 HOMER            SIMPSON              06012002 M W A  72    74
_ 300035470899 HOMERR           SIMPSON              12121960 M W A  67    68
_   315449829 HOMER             SIMPSON              08191971 M W A  49    66
_   315224545 HOMER             SIMPSON              06121957 M W A  72    66
_   098645978 HOMER             SIMPSON              10011920 M W I  72    58
_ 300007090899 HOMER            SIMPSON              01011993 F W I  21    42




PF17: ARIR  (NO SELECT); PF20: TOP OF LIST; PF22: NEW INDV; PF23: AEIPC
NEXT TRAN: _____   PARMS: _____

4B                   @ :00.2                                         08/02
Connected to host 10.1.23.59 (TCP04710)
```

| 16. | Complete screen **ARCR – Statewide Clearance Results**, if necessary. If an individual is known to ICES, use the inactive case number containing the most current/correct information. Reset the case number on ARCR if a more appropriate case number is available. A listing of File Clearance Failure Reason Codes can be accessed by entering TRAN: RFDI; PARMS: TSCF. |

ICES - EXTRA® Enterprise 2000

File Edit View Tools Session Options Help

```
ARCR              STATEWIDE CLEARANCE RESULTS        06/15/07 08:37
COUNTY: 49   APPL NBR: 3000341275    WORKER: T49704      T49704 A TEST/ROGER
             CASE NBR:              SCREENER: T49704
                                                   CURR/LAST        CLEAR RSN
  SEL    FIRST    MI    LAST     SUF    SSN     KNOWN CASE ST FH   STAT CDE
    HOMER           SIMPSON          310887725            0    N   FAIL 01




     PF16: ARAD   PF17: ARIR  PF18: ARIS   PF20: TOP LIST  PF21: RESET CASE
     NEXT TRAN: _____  PARMS: _____
```

Connected to host 10.1.23.59 (TCP04710)

17.	DUPLICATE RID: should a duplicate RID be discovered, a *User Defined* task with a same day deadline will need to be created and sent to the "Problem Resolution" queue to resolve the duplicate RID. REFER TO CREATE A USER DEFINED TASK (INSERT HYPERLINK) SECTION 3.11.1.3. The application should be retained, notes entered into WFMS (if CLRC not available) detailing the events and an appointment to interview the applicant should be scheduled (see Step 13 & 14) for two business days in the future, if unable to continue.
18.	View screen **ARPC – Prior Contacts List**, if necessary.

```
ICES - EXTRAN Enterprise 2000
File  Edit  View  Tools  Session  Options  Help

ARPC                      PRIOR CONTACTS LIST            06/15/07 08:44
COUNTY: 49   APPL NBR: 3000341275                       T49704 A TEST/ROGER

INDIV NUM        FIRST    MI    LAST       SUF   SSN        DOB      S   R
300074762099  HOMER            SIMPSON           310882225  05231973  M   W

        PROGRAMS                IDENTIFIER   STATUS    BEGIN      END     COUNTY
        APPLCN REGISTRATION     3000341275   PEND      06/15/07           49



NEXT TRAN: _____  PARMS: _____

4B            0 :00.1                                              23/13
```

| 19. | Complete/review screen **ARCP – Choice of Programs**, if necessary for all household members. |

```
ICES - EXTRA!! Enterprise 2000                                    _ |&|X|
File  Edit  View  Tools  Session  Options  Help

ARCP                      CHOICE OF PROGRAMS           06/15/07  08:45
COUNTY: 49    APPL :  3000341275   WORKER: T49704      T49704 A TEST/ROGER
LAST ACTIVITY DATE:   06/15/07      STATUS: PEND
ALL LISTED INDIVIDUALS APPLY FOR CASH, MEDICAL, FS:     _


INDIVIDUAL    CASH,MEDICAL,FS    CASH  MEDICAL   FS    MA ENROLL
 1 HOMER S          _             N      Y      N         N














 NEXT TRAN: _____   PARMS: _____

4B                      0 :00.1                                 07/51
Connected to host 10.1.23.59 (TCP04710)                    Page001    CAP
Start ...                                                  100%    8:43 AM
```

| 20. | Complete screen **ARAS – Application Screening**, if necessary. |
| | |

```
ARAS                    APPLICATION SCREENING          09/27/07 13:13

 COUNTY: 72   APPL NBR: 3000136527    WORKER:         W99181 T
TEST/HEWET

 APPL DATE: 07/02/03   STATUS: CA    SCREENER: DNT052

 1. IS ANY INDIVIDUAL A MIGRANT OR SEASONAL FARM WORKER? N

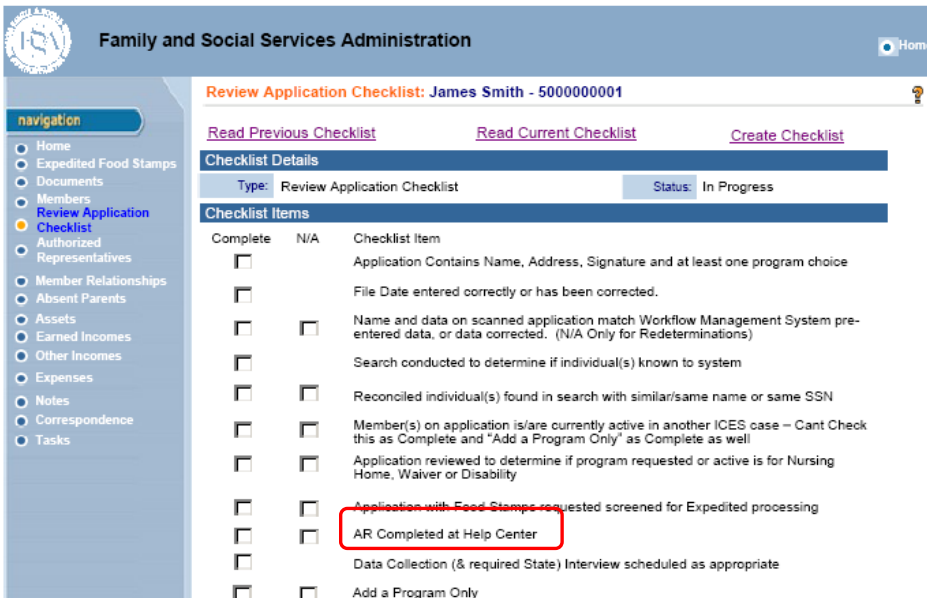   IF YES,

   WILL YOU RECEIVE INCOME FROM YOUR FORMER EMPLOYER AFTER
TODAY? N

   WILL YOU RECEIVE MORE THAN $25 INCOME FROM YOUR NEW
EMPLOYER

    WITHIN 10 DAYS?  N

   WILL YOUR LIQUID RESOURCES, SUCH AS CASH, CHECKING/SAVINGS,
BE $100

    OR LESS? Y

2. ARE YOUR MONTHLY RENT/MORTGAGE AND UTILITIES MORE THAN
```

	YOUR GROSS
	
	   MONTHLY INCOME AND LIQUID RESOURCES? Y
	
	3. IS YOUR GROSS MONTHLY INCOME LESS THAN $150? Y
	
	4. ARE YOUR LIQUID RESOURCES,SUCH AS CASH CHECKING/SAVING ACCOUNTS,
	
	   $100 OR LESS? Y

21.	Left click on Home in the Left Navigation and under the *Options* cluster, click *Completed AR in ICES*. Then left click on Close. **Options** Completed AR in ICES
22.	From the Left Navigation click on *Review Application Checklist* to complete the checklist indicating "*AR Completed at Help Center*". Then left click on Save. Family and Social Services Administration ⦿ Home Review Application Checklist: James Smith - 5000000001 Read Previous Checklist Read Current Checklist Create Checklist **Checklist Details** Type: Review Application Checklist Status: In Progress **Checklist Items** Complete N/A Checklist Item ☐ Application Contains Name, Address, Signature and at least one program choice ☐ File Date entered correctly or has been corrected. ☐ ☐ Name and data on scanned application match Workflow Management System pre-entered data, or data corrected. (N/A Only for Redeterminations) ☐ Search conducted to determine if individual(s) known to system ☐ ☐ Reconciled individual(s) found in search with similar/same name or same SSN ☐ ☐ Member(s) on application is/are currently active in another ICES case – Cant Check this as Complete and "Add a Program Only" as Complete as well ☐ ☐ Application reviewed to determine if program requested or active is for Nursing Home, Waiver or Disability ☐ ☐ Application with Food Stamps requested screened for Expedited processing ☐ ☐ AR Completed at Help Center ☐ Data Collection (& required State) Interview scheduled as appropriate ☐ ☐ Add a Program Only
23.	Click *Home* from the *Left Navigation*. **navigation** ⦿ Home ○ Expedited Food Stamps ○ Documents

	The WFMS will navigate to the *Application Home Page*.
24.	Log applicant in as seen on screen CSODA by entering "X" in the "S" (select) field.
25.	REFER TO (INSERT HYPERLINK) SEARCH INSTRUCTIONS Volume 7 Common Processes – Section 3.11.3 For applications already known to WFMS, from the *Application Case Home* page in the WFMS click *Notes* from the Left Navigation. Review all notes, if any, applicable to the application and continue to the following step. O Expenses O Notes O Communications
26.	Click *Home* from the *Left Navigation*. navigation O Home O Expedited Food Stamps O Documents The WFMS will navigate to the *Application Case Home* page.
27.	Click on *Documents* from the Left Navigation. Review all supporting documents, if any, submitted along with the application. If any supporting documents satisfy the verification requirement, remember to enter the appropriate information and verification code in ICES during the interview. navigation O Home O Documents O Programs The WFMS will navigate to the *Documents* page.
28.	From the *Documents* page click view to see the document's details.

FSSA - WFMS Documents: MOM CASETWOO - 2000085098 - Microsoft Internet Explorer provided by FSSA - State of Indiana

File   Edit   View   Favorites   Tools   Help

Back | Search | Favorites

Address https://s990atap01.iem.local:11213/HCSSApplication/en_US/EMStandardCaseDocument_listIndexedDocumentsPage.do?caseID=9001553377&__o3rpu=EMStandard_home   Go   Links

Family and Social
Services Administration   Home

navigation
- Home
- Applications
- Documents
- Members
- Addresses
- Phone Numbers
- Pending Verification Checklist
- Data Collection Checklist
- Second Party Review Checklist
- Change Checklist
- Solicited Documents Requests
- Correspondence
- Notes
- Asset/Trust Review
- Benefit Recovery
- Tasks

recent items

Documents: MOM CASETWOO - 2000085098   Help

[Search Non-Indexed Documents] [Attach Document] [Delink & Search Case] [Delink & Search Person] [Delink]

To **View** additional document detail or **Edit** the document detail, click on the **View** or **Edit** link.

To **Delink** documents from this list and **Attach** the documents to another case or person, check the appropriate box (es); then select the **Delink & Search Case** or **Delink & Search Person** button.

To **Delink** the documents only, select **Delink**.

Note: To select **All** documents in this list, check the top box (next to **Action**).

☐	Action	Document Type	Document Name	Client	Receipt Date	Status	Related Case ID
☐	View|Edit	Income	Pay Statement	HIPPY CASETWOO	12/3/2007	Accepted	9000029460
☐	View|Edit	Unknown Documents	Unknown	MOM CASETWOO	12/3/2007	Accepted	9000029460
☐	View|Edit	Unknown Documents	Unknown	MOM CASETWOO	12/3/2007	Accepted	9000029460
☐	View|Edit	Vital Statistics	Photo identification other than driver's license	MOM CASETWOO	12/3/2007	Accepted	9000029460
☐	View|Edit	HIP Client Notice	HIP Client Report a Change	MOM CASETWOO	12/4/2007	Accepted	9000029460
		HIP Power	HIP Power				

Start | Work Instructions | FSSA - WFMS Docume... | Work Instructions - Com...   Internet   7:03 PM

29.	Within the *View Document Details* screen click the document name hyperlink to view the document itself, take appropriate action in ICES.

	Click on close. The WFMS will navigate back to the *Documents Page*.
30.	Search for any tasks related to the application that may be outstanding. From the *Documents Home* page click on Tasks from the Left Navigation.

31.	The WFMS will navigate to the *Tasks* page. Take note of any outstanding (OPEN) tasks that may need to be addressed. Navigate back to the *Application Home* page by clicking on *Home* in the Left Navigation.

32.	From the *Application Case Home Page*, under the *Options* cluster, click *Send AE Information to ICES*. Then click on Close.
	Send AE Information to ICES
33.	In ICES enter TRAN: AECSQ PARMS: ICES Application Number.
34.	The WFMS will push the application information through the AE driver flow in ICES.
	Complete the AE driver flow.
	Note**: ICES reconciliation screens** appear in the driver flow when AE Information is sent to ICES from the WFMS Application Case for members known to ICES. ICES reconciliation screens allow you to choose which data (either WFMS application case data or pre-existing ICES data) pre-populates fields in ICES during the AE push.
35.	From the *Application Case Home* page, under the *Options* cluster, click *Completed AE in ICES*.
	Completed AE in ICES
	Curam will automatically move from the Application Case Home page with the Curam created number to the Case Home page displaying the ICES case number.

36.	TO MODIFY THE PENDING VERIFICATION CHECKLIST:

If missing or incomplete information is identified on AEPND in ICES, review the Pending Verification Checklist located in the WFMS case and modify, if necessary. Note: The most current Pending Verification checklist will auto populate the FI 2032.

- From the Case Home Page Click on Pending Verification Checklist in Left Navigation.

- WFMS will navigate to Pending Verification Checklist..

- Click on Edit at the bottom of the Current Checklist.

- The Current Checklist will display

- Click on any item(s) that are needed to add or remove.

- Click on the name of client to whom the item pertains. **CTRL CLICK**: To add more then one member per item or to remove a member, the ctrl button on the keyboard needs to be pressed while clicking on the additional name to be added or name to be removed.

- For recertification interviews select *Summary of Eligibility Redetermination Information* and *Rights and Responsiblities.* This form will include client information provided by the client during the data gathering interview. WFMS will create the packet separately from the FI2032 to be mailed the

	following day. The client is to review, sign, date and return the summary.
	• ☐ Summary of Eligibility Redetermination Information
	• Click Save.
	.
37.	Click on Correspondence in Left Navigation to **generate the FI 2032 and any additional forms**. **Take special care to verify that the deadline date is correct on the Create Correspondence Details page.**

Refer to SEND NOTICE WORK INSTRUCTIONS IN VOLUME 7 COMMON PROCESSES – Section 3.11.4 (INSERT HYPERLINK) - TO:

• VIEW CORRESPONDENCE HISTORY IN WFMS Section 3.11.4.7 (INSERT HYPERLINK) to view an FI-2032 created by Non-state Coalition staff.

• CREATE CORRESPONDENCE IN WFMS Section 3.11.4.3 (INSERT HYPERLINK) to create the FI-2032, if necessary.

• EDIT CORRESPONDENCE IN THE WFMS Section 3.11.4.8 (INSERT HYPERLINK) to edit/modify the deadline date of an FI-2032 created by Non-state Coalition staff, if necessary.

• DELETE CORRESPONDENCE IN THE WFMS Section 3.11.4.9 (INSERT HYPERLINK) to delete an FI 2032 created by Non-state Coalition staff, if necessary.

• REFER TO (INSERT HYPERLINK) PRINT CORRESPONDENCE IN SEND NOTICE WORK INSTRUCTIONS VOLUME 7 COMMON PROCESSES 3.11.4.6 for correspondence (FI-2032/Coversheet) that will be given directly to the applicant. Take special care to verify that the deadline date is correct on the Create Correspondence Details page. It may need to be modified. Remember to click on Edit on the Correspondence page and click on Pending Verification Hand Delivered on the Modify Correspondence Details page to avoid having WFMS mail the FI-2032. Volume 7 Common Processes – Section 3.11.4.6

Note: The first screen of Create Correspondence will allow the user to enter an additional address for third party correspondence or an alternative mailing address if the WFMS mailing address is not current. Refer to ICES for current mailing address. |

Create Correspondence

CorrespondenceDetails - Addressee

Addressee Type: [Third Party ▼]

If Address Type is Participant, select the Member Name

Addressee Name: [▼]

If Address Type is Third Party or Authorized Representative

Addressee Name: [ ]

Enter Address Details for Third Party or Authorized Representative. Information is optional for Pa

Address Line 1: [ ]

Address Line 2: [ ]

City: [ ]

State: [▼]

Zip: [ ]

Select The Participant This Correspondence Is In Regards To

Member Name: [LAURA BUSH ▼]

[Save] [Cancel]

*Note: if an individual in the assistance group is IMPACT sanctioned and expresses the desire to cure their sanction, the user selected task "Intent to Cure" must be generated immediately to Arbor directing the task to the Arbor Area queue associated with the applicant's/recipient's residence.

38.	Complete the Interactive SEC Interview Guide and attach it to the case in WFMS. REFER TO (INSERT HYPERLINK) CREATING AN ATTACHMENT FROM THE FILE SERVER Volume 7 Common Processes Section 3.11.4.12, Steps 1 - 12.
39.	From the *Application Home Page*, under the *Options* cluster, click *Initiate Data Broker*. Initiate Data Broker **NOTE**: *Data Broker not available for Pilot.*
40.	If necessary, reference Volume 7 Common Processes – CREATE A TASK Section 3.11.1.2 (INSERT HYPERLINK) to create any of the tasks that are necessary for processing the application: a. Out of State Inquiry Request

	b. Front-End Integrity Review Referral
	c. Suspected Fraud Referral
	d. Asset/Trust Review Requested
	e. Systematic Alien Verification Entitlement (SAVE) Request
	f. Resource Assessment Request
41.	Review ICES screen AEWAA. Evaluate the reason codes for potential eligibility.
| **42.** | Review all budget results with the applicant, and advise them of their Rights and Responsibilities. Review ICES screen AEPND with the applicant to evaluate missing information and/or verification(s) outstanding, if any. *Enter TRAN: AEPND; PARMS: ICES Case Number.* <br><br> ```
AEPND          PENDING DATA FOR ELIGIBILITY DECISIONS    07/09/07 14:41
COUNTY: 49  CASE: 3000347793   WORKER: T49704            T49704 A TEST/ROGER
LAST ACTIVITY DATE: 07/09/07   STATUS: PENDING

INDIVIDUAL    SCREEN  INCOMPLETE INFORMATION
-----------   ------  -------------------------------

01 MEDIC D    AEIDP   PROOF OF MA DISABILITY
``` |
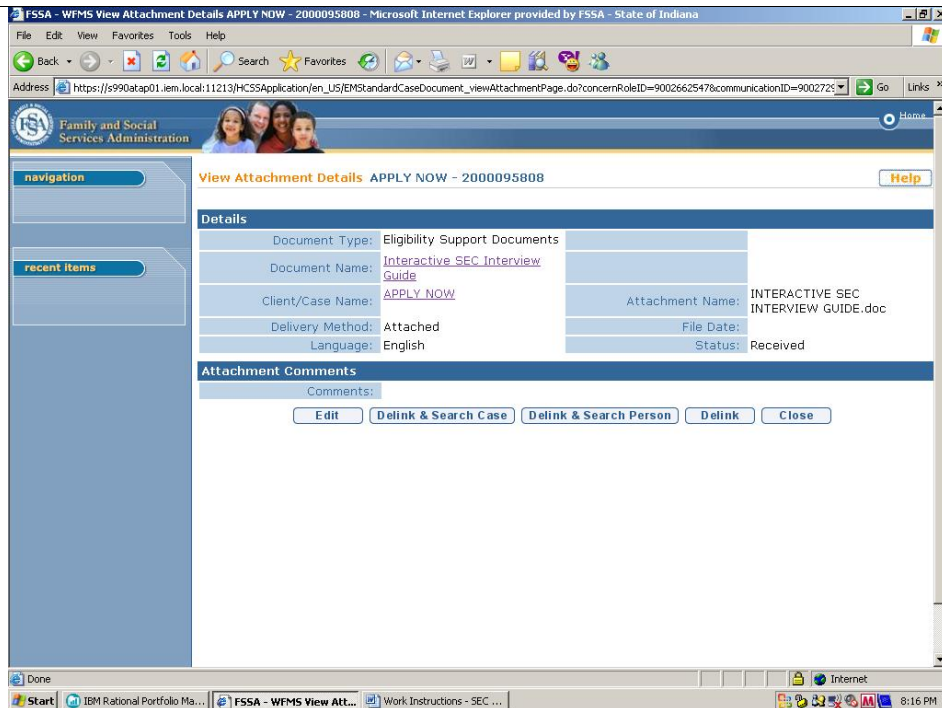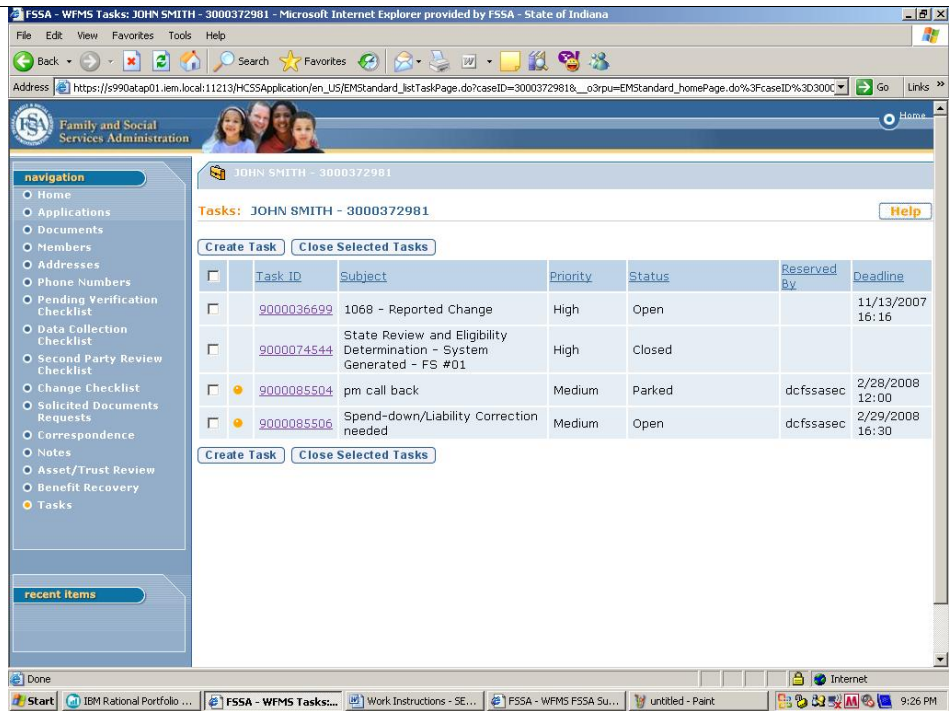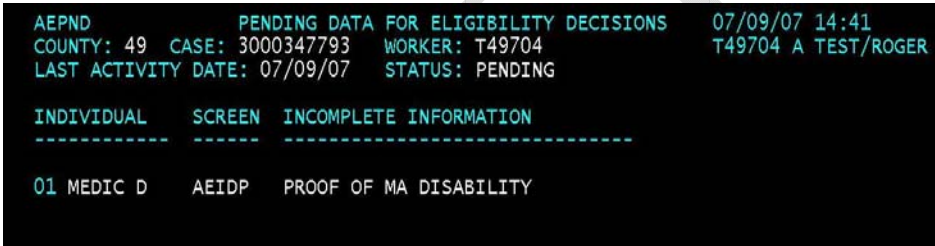| **43.** | In ICES, enter TRAN: CLRC        PARMS: ICES Case Number. <br><br> ```
NEXT TRAN: CLRC____  PARMS: 3000076384____
``` <br><br> Enter case notes regarding the application processing (following guidelines for entering information into CLRC). |
44.	Authorize the AG(s) if appropriate.
45.	Issue over the counter EBT card if appropriate. Refer to the EBT policy guide for instructions.
45.	Left click on Home in the left navigation. From the Case Home left click on the "Generate Internal Cover Sheet" button in the top right of the page to generate a "Document Transfer Cover Sheet" which must accompany any submitted verifications that will be faxed immediately to the Document Center by the SEC. A "File Download" box will appear. Left click on "Open". Left click on the printer icon in the upper left hand portion of the screen and close the document screen. The printed Document Transfer Cover Sheet must be hand modified and have "Image Only" checked prior to faxing. The Application must be faxed separately.**.**

46.	If processing a Medicaid Disability Application/Progress Report at the Food Stamp interview follow the steps below:
	Complete the Determination of Medicaid Eligibility Social Summary (Social Summary) for medical and psychological treatment in the past 12 months. Refer to (INSERT HYPERLINK) Creating an Attachment from the File Server in Volume 7, Section 3.11.4.12, steps 1-12 to complete the Determination of Medicaid Eligibility Social Summary and attach the form to Documents in the WFMS case.
	If medical documentation is provided by the client generate a separate Internal Cover Sheet selecting "Image and Process" to accompany the documents and fax immediately to the Document Center:
	➢ Left click on Home in the left navigation. From the Case Home left click on the "Generate Internal Cover Sheet" button in the top right of the page to generate a "Document Transfer Cover Sheet" which must accompany any submitted verifications that will be faxed immediately to the Document Center by the SEC. A "File Download" box will appear. Left click on "Open". Left click on the printer icon in the upper left hand portion of the screen and close the document screen. The printed Document Transfer Cover Sheet must be hand modified and have "Image and Process" checked prior to faxing.
	➢ Return to ICES screen AEMDT and update with the dates that the notices have been sent; update CLSC with the actions taken regarding the notices for the MA D documents.
	If a current exam is not needed, refer to Create Correspondence Work Instructions (INSERT HYPERLINK) in Volume 7, section 3.11.4.2 (for a third party) and Print Correspondence (INSERT HYPERLINK) in Volume 7, section 3.11.4.6 to perform the following:
	➢ Create an *Initial Notice to Provider for Records (2322)* for each provider the client has been to in the past twelve (12) months as indicated in Section 4 D of the Social Summary.
	➢ Complete the fields on the form, as appropriate.
	➢ Use the Add Additional Correspondence function to generate a *Determination for Disability Authorization for Release of Medical Information (OMPP 3512)* form with each Provider request.
	➢ Use the Add Additional Correspondence function to generate any additional form(s) needed to accompany the request such as the *Authorization for Examination to Determine Disability for Medical Assistance (OMPP 251),Determination of Medicaid Disability Medical Information (OMPP 251A)* or the *Physicians-Optometrist Report on Eye Examination (OMPP 0045).*
	➢ A General Use Coversheet is generated with each request for the

	provider to utilize. ➢ For multiple Providers the process must be repeated for each Provider. • Have applicant sign the releases. • A copy of the signed release forms should accompany the General Internal Coversheet as "Image Only" that will be faxed immediately to the Document Center by the SEC. Refer to step 45. • Mail the hardcopy original request(s) and signed release(s) to the Provider(s). • After sending the *Initial Notice to Provider for Records (2322),* return to ICES screen AEMDT and update with the dates that the notices have been sent; update CLSC with the actions taken regarding the notices for the MA D documents. **If a current exam is needed or Provider information is not supplied**, provide the applicant with a pending notice (FI 2032), and the *Initial Action Notice to Applicant (FI 2320)*. Refer to Create Correspondence Work Instructions (INSERT HYPERLINK) in Volume 7, Section 3.11.4.2. • Note: If the applicant/client has an Authorized Representative (AR), remember to add an additional addressee so that the AR also receives the correspondence. • Return to ICES screen AEMDT and update with the dates that the notices have been sent; update CLSC with the actions taken regarding the notices for the MA D documents.
47.	Remember to close any task enacted upon. To do so, Click on *Close Task* on the *Task Home* page.

48.	Go to CSOUU to enter the worker ID of the interviewer.
49.	Assigned worker will need to note client as being seen by the entry of "Y" on CSOWL.

4.0 Applicant Fails to Keep Scheduled Appointment

If the applicant fails to keep their scheduled appointment and no application has been filed, no further action is necessary. If an application is on file with an ICES case number (AR completed and appointment scheduled in ICES) an SEC created "Manual Notice of Missed Interview" is not necessary. If an application is on file but AR has not been completed (ex: expedited applicant fails to appear for their scheduled interview), an SEC created "Manual Notice of Missed Interview" is necessary. Note the following steps are necessary if an application was received.

Note: Every application must have a WFMS application case created

Steps	Applicant Fails to Keep Scheduled Appointment
1.	If a "Manual Notice of Missed Interview" is necessary, refer to Create Correspondence in WFMS Section 3.11.4.3 (INSERT HYPERLINK).
2.	Click *Notes* from the Left Navigation. O Expenses ● Notes O Communications The WFMS will navigate to the *Notes Page*.
3.	Click *New*. New The WFMS will navigate to the *Create Note Page*.
4.	Enter case notes regarding the application and any actions taken (i.e. appointments scheduled and missed, information modified, information pertinent to processing the application, etc.).
5.	The application and any corresponding documents must be faxed immediately to the document center. All documents must include a "Document Transfer Cover Sheet" with "Image Only" checked. From the Application Case Home page you may generate a "Document Transfer Cover Sheet" by left clicking on the "Generate Internal Cover Sheet" button in the top right of the page.

5.0 Add a Program/AG Applicant Keeps In-Office Scheduled Appointment

If an Add a Program application is received at the Local Office and does not include expedited food stamps, it should be faxed immediately to the document center for processing. The applicant may have been scheduled for an expedited appointment by either the Call Center or Local Office staff, or the applicant has requested an in-office interview. All scheduled appointments for the Local Office are displayed on CSODA. Local Office staff should view CSODA periodically throughout the day as additional appointments may be added. *Should an applicant appear for a scheduled interview and no valid application has been submitted, a valid application must be received before the interview.*

Note: Every application must have a WFMS application case created .

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
1.	REFER TO (INSERT HYPERLINK) SEARCH INSTRUCTIONS Volume 7 Common Processes – Section 3.11.3 *Note*: a signed copy of the following must be submitted to the local office, or viewable in WFMS, before a non-redetermination Food Stamp interview takes place in the local office. ▪ The last page of the "Notice Regarding Rights & Responsibilities" indicating that the applicant has received and understands the "Notice Regarding Rights & Responsibilities". ▪ Section A of the "Indiana Application for Assistance" indicating the applicant's name, address and program choice. ▪ Section D of the "Indiana Application for Assistance" indicating the applicant's Authorized Representative(s), if applicable. ▪ Section L of the "Indiana Application for Assistance" indicating the applicant's Assignment of Rights (if applicable), their agreeing to Food Stamp Work Registration rules (if applicable) and/or Voter Registration choice. Search for the applicant in WFMS to determine their status. ✓ If after a search of WFMS is made and the applicant's "*AG/Case Type*" appears as "*Application Case*" and the above signature pages have been submitted (hard copies available or documents viewable in WFMS), begin at Step 2 below. . If the application is viewable in documents and the signatures listed have not been obtained print application and obtain signatures. ✓ If after a search of WFMS is made and the applicant's "*AG/Case Type*" appears as "*Screening Case*" complete Steps 2 through 11 of **Applicant Keeps Scheduled Appointment** above to create and print a hard copy application for signature/submission**;** and to create an application in WFMS. . If the application is viewable in documents and the signatures listed have not been obtained print application and obtain signatures. ✓ If after a search of WFMS is made and the applicant has no record, complete Steps 2 through 11 of **Applicant Keeps Scheduled Appointment** above to create and print a hard copy application for signature/submission**;** and to create an application in WFMS.

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
2.	The application status must be modified to "Submitted - Add a Program". From the "*Application Case Home*" page complete the following: ▪ Click on the Edit button ▪ On the Modify Application Case page change the Application Status, by clicking on the drop down box, to "Submitted - Add a Program" ▪ Add the township information ▪ Delete any X's that may appear inappropriately in fields ▪ Change the language from Arabic to English if necessary and ▪ Note the type of health coverage if Medicaid is requested ▪ Answer Yes to, "Currently Receiving Benefits" ▪ Enter the ICES case number after, "If Yes, What is the Case Number" ▪ Change the application status to, "Submitted – Add a Program" from the dropdown that appears after "Application Status" ▪ Click on Save, which will navigate to the Related Case Search page **Related Search Case** **Search Criteria** ICES/Curam Case Number: Case Reference: SSN: (Don't enter dashes) ICES RID: First: Middle/MI: Last: DOB: (dd/mm/yyyy) Address Line1: Address Line2: County: City: State: Zip Code: [Search] [Reset] [Cancel] **Search Results** Action Case Name SSN Case Type Case Reference Date Created St ▪ Enter the ICES case number of the existing case to be linked to the application case in the appropriate field and click on Search

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
	  ■ Select the Standard Case number, which will take you back to the *Application Case Home* page. A case number must be selected at this point in time to link the Application Case to the Standard Case. ■ Click on *Related Cases* in the Left Navigation to navigate from the Application Case to the Standard Case. To navigate from the Standard Case back to the Application Case, click on *Applications* in the left navigation. ■ Click on the ICES case number under Case Reference which will take you to the Case Home page
3.	Log applicant in as seen on screen CSODA by entering "X" in the "S" (select) field.
4.	From the *Case Home Page* in the WFMS, click *Documents* from the Left Navigation. Review all supporting documents, if any, submitted along with the application. If any supporting documents satisfy the verification requirement, remember to enter the appropriate information and verification code in ICES during the interview. The WFMS will navigate to the *Documents Page*.
5.	From the *Documents* page click view to see the document's details.

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
6.	Within the *View Document Details* screen click the document name hyperlink to view the document itself, take appropriate action in ICES.

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
	Click on close. The WFMS will navigate back to the *Documents Page*.
7.	Search for any additional tasks related to the case that may be outstanding. From the *Documents Home* page click on *Tasks* from the Left Navigation.

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
8.	The WFMS will navigate to the *Tasks* page. Take note of any outstanding tasks that may need to be addressed. Selecting a task listed to a queue in which you are assigned will reserve that task in your ID to be worked, closed or parked. Navigate back to the *Case Home* page by clicking on *Home* in the Left Navigation.

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
9.	Go to ICES. *Note: check to see if a redetermination is pending before attempting to complete the Add a Program using AEREV. If a redetermination is pending, the AEREV driver can not be invoked. Enter TRAN: AEREV; PARMS: ICES Case Number. NEXT TRAN: AEREV___ PARMS: 3000337737_
10.	On ICES screen AEICP, enter Y for the program(s) requested on the application. Complete appropriate ICES screens during the interview with the applicant. Identify missing or incomplete information in ICES with question marks. *Note: if an individual in the assistance group is IMPACT sanctioned and expresses the desire to cure their sanction, the task "Intent to Cure" must be generated immediately to Arbor directing the task to the Arbor Area queue associated with the applicant's/recipient's residence. REFER TO (INSERT HYPERLINK) CREATE A TASK Volume 7 Common Processes – Section 3.111.2

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
| | ```
AEICP                    CHOICE OF PROGRAMS           07/09/07  14:59
COUNTY: 49   CASE :  3000347793   WORKER: T49704       T49704 A TEST/ROGER
LAST ACTIVITY DATE:  07/09/07      STATUS: PEND
ALL LISTED INDIVIDUALS APPLY FOR CASH, MEDICAL, FS:    _


INDIVIDUAL    CASH,MEDICAL,FS    CASH  MEDICAL   FS    MA ENROLL
 1 MEDIC D           _            N      Y       Y       N
``` |
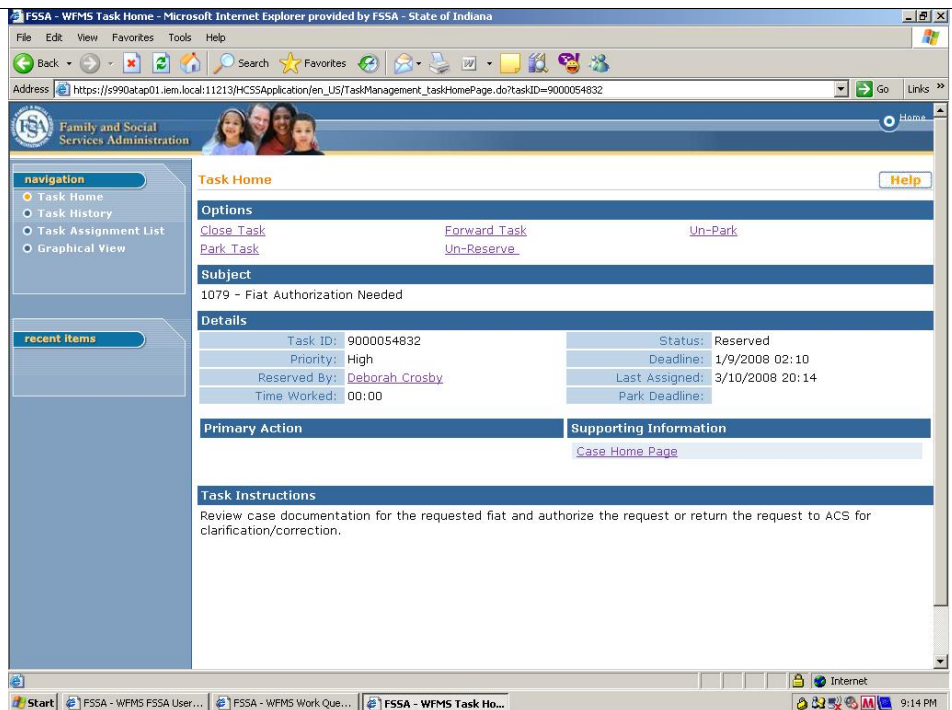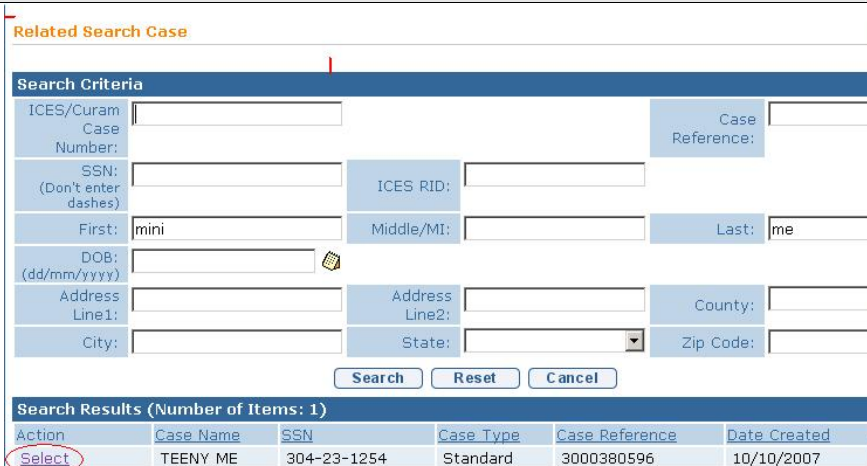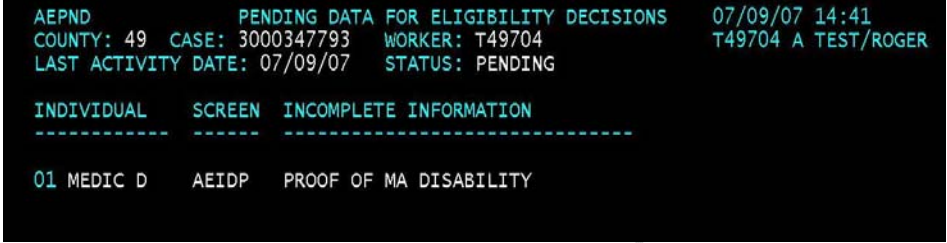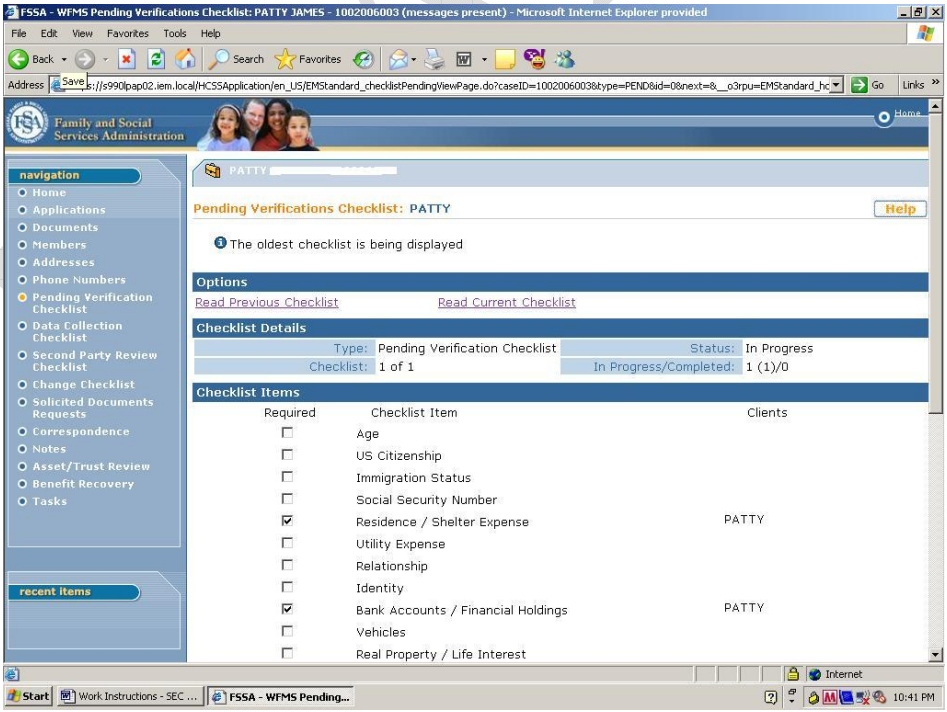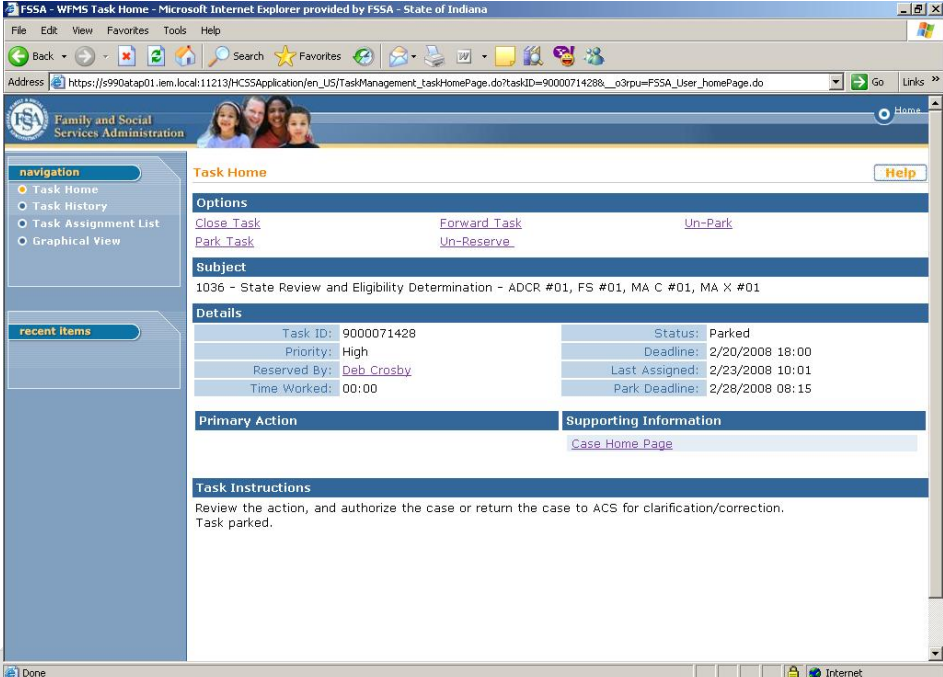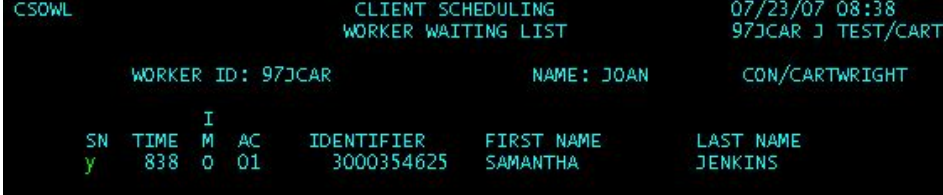| 11. | Complete the SEC Interview Guide and attach it to the Standard Case in WFMS.

REFER TO (INSERT HYPERLINK) CREATING AN ATTACHMENT FROM THE FILE SERVER   Volume 7 Section 3.11.4.12, Steps 1 - 12. |
12.	Run ED/BC in ICES, reviewing all Assistance Group and Financial Summary Screens for accuracy.
13.	From the *Case Home Page*, under the *Options* cluster, click *Initiate Data Broker*. Initiate Data Broker *NOTE: Data Broker not available for Pilot.*

14.	If necessary, reference Volume 7 Common Processes CREATE A TASK – Section 3.11.1.2 (INSERT HYPERLINK), to create of the tasks that are necessary for processing the application:
	  a. Suspected Fraud Referral
	
	  b. Asset/Trust Review Requested
	
	  c. Systematic Alien Verification Entitlement (SAVE) Request

15.	Review ICES screen AEWAA. Evaluate the reason codes for potential eligibility.
16.	Review all budget results with the applicant, and advise them of their Rights and Responsibilities. Review ICES screen AEPND with the applicant to evaluate missing information and/or verification(s) outstanding, if any. *Enter TRAN: AEPND; PARMS: ICES Case Number.*

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
	If there is no pending information and/or verifications, skip to **Step 18**.
17.	**FI 2032/FI 2032A:** The FI 2032 Pending Verifications for Applicants-Recipients is pre-populated with information requested on the Pending Verification Checklist. Therefore, it is necessary to complete the Pending Verification Checklist in the WFMS before creating correspondence. The FI 2032A Pending Verifications for Applicants-Recipients for Application Case is NOT pre-populated with information requested on the Pending Verification Checklist. The FI 2032A Pending Verifications for Applicants-Recipients for Application Case should be used when only an application case exists or at the expedite appointment for an Add a Program/AG when the client name is not yet listed in the WFMS standard case. TO MODIFY THE PENDING VERIFICATION CHECKLIST:

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
	If missing or incomplete information is identified on AEPND in ICES, review the Pending Verification Checklist located in the WFMS case and modify, if necessary. Note: The most current Pending Verification checklist will auto populate the FI 2032. • From the Case Home Page Click on Pending Verification Checklist in Left Navigation. • WFMS will navigate to Pending Verification Checklist.. • Click on Edit at the bottom of the Current Checklist. • The Current Checklist will display • Click on any item(s) that are needed to add or remove. • Click on the name of client to whom the item pertains. **CTRL CLICK**: To add more then one member per item or to remove a member, the ctrl button on the keyboard needs to be pressed while clicking on the additional name to be added or name to be removed. • For recertification interviews select *Summary of Eligibility Redetermination Information* and *Rights and Responsibilities*. This form will include client information provided by the client during the data gathering interview. WFMS will create the packet separately from the FI2032 to be mailed the following day. The client is to review, sign, date and return the summary. • ☐ Summary of Eligibility Redetermination Information • Click Save.
18.	Click on Correspondence in Left Navigation to **generate the FI 2032 and any additional forms**. **Take special care to verify that the deadline date is correct on the Create Correspondence Details page.** Refer to SEND NOTICE WORK INSTRUCTIONS IN VOLUME 7 COMMON PROCESSES – Section 3.11.4 (INSERT HYPERLINK) - TO: • VIEW CORRESPONDENCE HISTORY IN WFMS Section 3.11.4.7 (INSERT HYPERLINK) to view an FI-2032 created by Non-state Coalition staff. • CREATE CORRESPONDENCE IN WFMS Section 3.11.4.3 (INSERT HYPERLINK) to create the FI-2032, if necessary. • EDIT CORRESPONDENCE IN THE WFMS Section 3.11.4.8 (INSERT

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
	HYPERLINK) to edit/modify the deadline date of an FI-2032 created by Non-state Coalition staff, if necessary. • DELETE CORRESPONDENCE IN THE WFMS Section 3.11.4.9 (INSERT HYPERLINK) to delete an FI 2032 created by Non-state Coalition staff, if necessary. • REFER TO (INSERT HYPERLINK) PRINT CORRESPONDENCE IN SEND NOTICE WORK INSTRUCTIONS VOLUME 7 COMMON PROCESSES 3.11.4.6 for correspondence (FI-2032/Coversheet) that will be given directly to the applicant. Take special care to verify that the deadline date is correct on the Create Correspondence Details page. It may need to be modified. Remember to click on Edit on the Correspondence page and click on Pending Verification Hand Delivered on the Modify Correspondence Details page to avoid having WFMS mail the FI-2032. Volume 7 Common Processes – Section 3.11.4.6 Note: The first screen of Create Correspondence will allow the user to enter an additional address for third party correspondence or an alternative mailing address if the WFMS mailing address is not current. Refer to ICES for current mailing address. **Create Correspondence** **CorrespondenceDetails – Addressee** Addressee Type: Third Party If Address Type is Participant, select the Member Name Addressee Name: If Address Type is Third Party or Authorized Representative Addressee Name: Enter Address Details for Third Party or Authorized Representative. Information is optional for Pa Address Line 1: Address Line 2: City: State: Zip: Select The Participant This Correspondence Is In Regards To Member Name: LAURA BUSH [Save] [Cancel] *Note: if an individual in the assistance group is IMPACT sanctioned and expresses the desire to cure their sanction, the user selected task "Intent to Cure" must be generated immediately to Arbor directing the task to the Arbor Area queue associated

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
	with the applicant's/recipient's residence
19.	Authorize the AG(s) if appropriate.
20.	Issue over the counter EBT card if appropriate. Refer to the EBT policy guide for instructions.
21.	In ICES, enter TRAN: CLRC PARMS: ICES Case Number. NEXT TRAN: CLRC____ PARMS: 3000076384____ Enter case notes regarding the application processing (following guidelines for entering information into CLRC).
22.	Left click on Home in the left navigation. From the Case Home left click on the "Generate Internal Cover Sheet" button in the top right of the page to generate a "Document Transfer Cover Sheet" which must accompany any submitted verifications that will be faxed immediately to the Document Center by the SEC. A "File Download" box will appear. Left click on "Open". Left click on the printer icon in the upper left hand portion of the screen and close the document screen. The printed Document Transfer Cover Sheet must be hand modified and have "Image Only" checked prior to faxing. The Application must be faxed separately.
23.	If processing a Medicaid Disability Application/Progress Report at the Food Stamp interview follow the steps below: Complete the Determination of Medicaid Eligibility Social Summary (Social Summary) for medical and psychological treatment in the past 12 months. Refer to (INSERT HYPERLINK) Creating an Attachment from the File Server in Volume 7, Section 3.11.4.12, steps 1-12 to complete the Determination of Medicaid Eligibility Social Summary and attach the form to Documents in the WFMS case. **If medical documentation is provided** by the client generate a separate Internal Cover Sheet selecting "Image and Process" to accompany the documents and fax immediately to the Document Center: ➤ Left click on Home in the left navigation. From the Case Home left click on the "Generate Internal Cover Sheet" button in the top right of the page to generate a "Document Transfer Cover Sheet" which must accompany any submitted verifications that will be faxed immediately to the Document Center by the SEC. A "File Download" box will appear. Left click on "Open". Left click on the printer icon in the upper left hand portion of the screen and close the document screen. The printed Document Transfer Cover Sheet must be hand modified and have "Image and Process" checked prior to faxing. ➤ Return to ICES screen AEMDT and update with the dates that the notices have been sent; update CLSC with the actions taken regarding

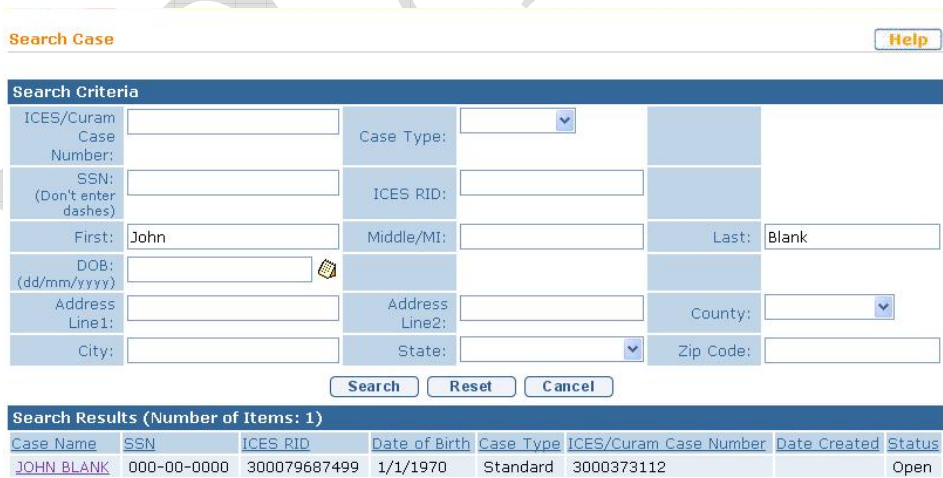| Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment

	the notices for the MA D documents.
	
	If a current exam is not needed, refer to Create Correspondence Work Instructions (INSERT HYPERLINK) in Volume 7, section 3.11.4.2 (for a third party) and Print Correspondence (INSERT HYPERLINK) in Volume 7, section 3.11.4.6 to perform the following:
	
	    ➢ Create an *Initial Notice to Provider for Records (2322)* for each provider the client has been to in the past twelve (12) months as indicated in Section 4 D of the Social Summary.
	
	    ➢ Complete the fields on the form, as appropriate.
	
	    ➢ Use the Add Additional Correspondence function to generate a *Determination for Disability Authorization for Release of Medical Information (OMPP 3512)* form with each Provider request.
	
	    ➢ Use the Add Additional Correspondence function to generate any additional form(s) needed to accompany the request such as the *Authorization for Examination to Determine Disability for Medical Assistance (OMPP 251),Determination of Medicaid Disability Medical Information (OMPP 251A)* or the *Physicians-Optometrist Report on Eye Examination (OMPP 0045).*
	
	    ➢ A General Use Coversheet is generated with each request for the provider to utilize.
	
	    ➢ For multiple Providers the process must be repeated for each Provider.
	
	   • Have applicant sign the releases.
	
	   • A copy of the signed release forms should accompany the General Internal Coversheet as "Image Only" that will be faxed immediately to the Document Center by the SEC. Refer to step 22.
	
	   • Mail the hardcopy original request(s) and signed release(s) to the Provider(s).
	
	   • After sending the *Initial Notice to Provider for Records (2322),* return to ICES screen AEMDT and update with the dates that the notices have been sent; update CLSC with the actions taken regarding the notices for the MA D documents.
	
	If a current exam is needed or Provider information is not supplied, provide the applicant with a pending notice (FI 2032), and the *Initial Action Notice to Applicant (FI 2320).* Refer to Create Correspondence Work Instructions (INSERT HYPERLINK) in Volume 7, Section 3.11.4.2.
	
	   • Note: If the applicant/client has an Authorized Representative (AR), remember to add an additional addressee so that the AR also receives the correspondence.

Steps	Add a Program/AG Applicant Keeps In-Office Scheduled Appointment
	• Return to ICES screen AEMDT and update with the dates that the notices have been sent; update CLSC with the actions taken regarding the notices for the MA D documents.
24.	Remember to close any task enacted upon. To do so, Click on *Close Task* on the *Task Home* page.
25.	Go to CSOUU to enter the work ID of the interviewer.
26.	Assigned worker will need to note client as being seen by the entry of "Y" on CSOWL.

6.0 Redetermination Scheduled In-Office (At Client's Request)

Redetermination appointments scheduled at Local Offices for SEC interviews will be those who have requested an in-office interview. All scheduled appointments for the Local Office are displayed on CSODA.

If additional programs are requested at the Redetermination interview, refer to Section 5.0 ADD A PROGRAM/AG KEEPS IN OFFICE SCHEDULED APPOINTMENT (INSERT HYPERLINK),

Note: Every application must have a WFMS application case created.

Steps	Redetermination Scheduled In-Office
1.	Find and select the case in WFMS. WFMS will display the Case Home page. REFER TO (INSERT HYPERLINK) SEARCH Volume 7 Common Processes – Section 3.11.3
2.	From the search results, click on the appropriate case name. WFMS will display the Case Home page.
3.	From the *Case Home Page* in the WFMS,

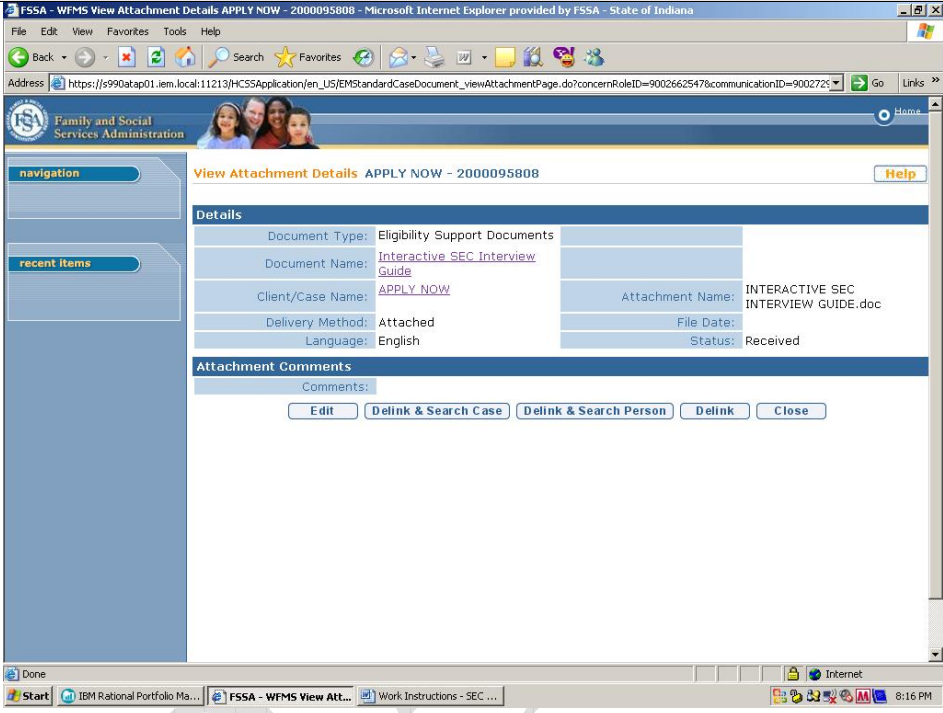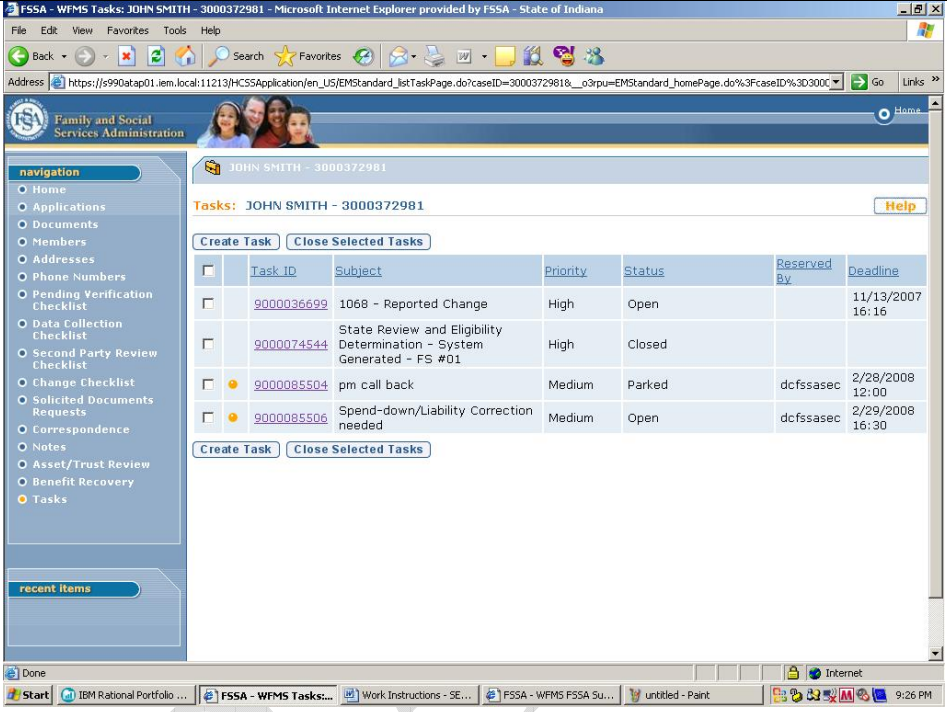| Steps	Redetermination Scheduled In-Office
	Click *Documents* from the Left Navigation. Review all supporting documents, if any, submitted along with the application. If any supporting documents satisfy the verification requirement, remember to enter the appropriate information and verification code in ICES during the interview. The WFMS will navigate to the *Documents Page*.
4.	From the *Documents* page click view to see the document's details.

Steps	Redetermination Scheduled In-Office
5.	Within the *View Document Details* screen click the document name hyperlink to view the document itself, take appropriate action in ICES.

Steps	Redetermination Scheduled In-Office
	Click on close. The WFMS will navigate back to the *Documents Page*.
6.	Search for any additional tasks related to the case that may be outstanding. From the *Documents Home* page click on *Tasks* from the Left Navigation.

Steps	Redetermination Scheduled In-Office
	navigation ○ Home ○ Applications ○ Documents ○ Members ○ Addresses ○ Phone Numbers ○ Pending Verification Checklist ○ Data Collection Checklist ○ Second Party Review Checklist ○ Change Checklist ○ Solicited Documents Requests ○ Correspondence ○ Notes ○ Asset/Trust Review ○ Benefit Recovery ○ Tasks
7.	The WFMS will navigate to the *Tasks* page. Take note of any outstanding tasks that may need to be addressed. Selecting a task listed to a queue in which you are assigned will reserve that task in your ID to be worked, closed or parked. Navigate back to the *Case Home* page by clicking on *Home* in the Left Navigation.

Steps	Redetermination Scheduled In-Office
8.	Navigate to ICES. Enter TRAN: AEORE PARMS: ICES Case Number. Complete the AEORE driver with the applicant. Identify missing or incomplete information in ICES with question marks. *Note: if an individual in the assistance group is IMPACT sanctioned and expresses the desire to cure their sanction, the task "Intent to Cure" must be generated immediately to Arbor directing the task to the Arbor Area queue associated with the applicant's/recipient's residence. REFER TO (INSERT HYPERLINK) CREATE A TASK Volume 7 Common Processes – Section 3.11.1.2
9.	Complete the Interactive SEC Interview Guide and attach it to the case in WFMS. REFER TO (INSERT HYPERLINK) CREATING AN ATTACHMENT FROM THE FILE SERVER Volume 7 Section 3.11.4.12, Steps 1 - 12.
10.	From the *Case Home Page*, under the *Options* cluster, click *Initiate Data Broker*.

Steps	Redetermination Scheduled In-Office
	Initiate Data Broker *NOTE: Data Broker not available for Pilot.*

11.	If necessary, reference Volume 7 Common Processes – Section 3.11.1.8
	to create and forward any of the tasks that are necessary for processing the redetermination:
	
	   a. Suspected Fraud Referral
	
	   b. Asset/Trust Review Requested
	
	   c. Systematic Alien Verification Entitlement (SAVE) Request

12.	Review ICES screen AEWAA. Evaluate the reason codes for potential eligibility.
13.	Review all budget results with the recipient. Review ICES screen AEPND with the recipient to evaluate missing information and/or verification(s) outstanding, if any. *Enter TRAN: AEPND; PARMS: ICES Case Number.* ``` AEPND PENDING DATA FOR ELIGIBILITY DECISIONS 07/09/07 14:41 COUNTY: 49 CASE: 3000347793 WORKER: T49704 T49704 A TEST/ROGER LAST ACTIVITY DATE: 07/09/07 STATUS: PENDING INDIVIDUAL SCREEN INCOMPLETE INFORMATION ----------- ------ -------------------------------- 01 MEDIC D AEIDP PROOF OF MA DISABILITY ```
14.	**FI 2032/FI 2032A:** The FI 2032 Pending Verifications for Applicants-Recipients is pre-populated with information requested on the Pending Verification Checklist. Therefore, it is necessary to complete the Pending Verification Checklist in the WFMS before creating correspondence. The FI 2032A Pending Verifications for Applicants-Recipients for Application Case is NOT pre-populated with information requested on the Pending Verification Checklist. The FI 2032A Pending Verifications for Applicants-Recipients for Application Case should be used when only an application case exists or at the expedite appointment for an Add a Program/AG when the client name is not yet listed in the WFMS standard case. If the missing or incomplete information is identified in ICES with question marks, modify the Pending Verification Checklist located in the WFMS case, if necessary. Note: The most current Pending Verification checklist will auto populate the FI 2032.

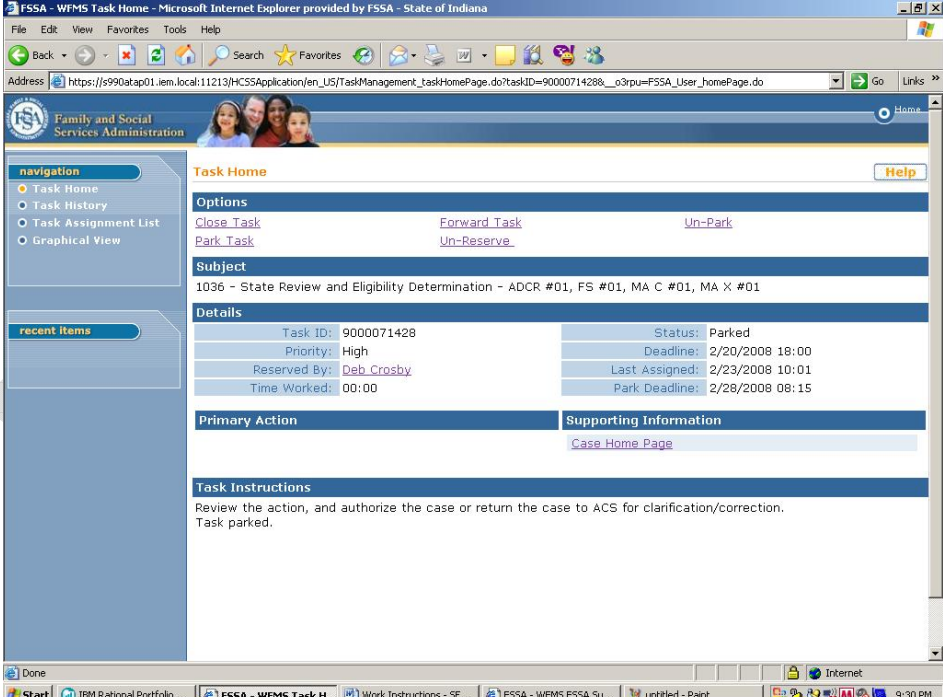| Steps	Redetermination Scheduled In-Office

TO MODIFY THE PENDING VERIFICATION CHECKLIST:

- Click on Pending Verification Checklist in Left Navigation.

- WFMS will navigate to Pending Verification Checklist.

- Click on Edit at the bottom of the Current Checklist.

- The Current Checklist will display

- Click on any item(s) that are needed to add or remove.

- Click on the name of client to whom the item pertains. Note: **Ctrl Click** To add more than one member per item or to remove a member, the ctrl button on the keyboard needs to be pressed while clicking on the additional name to be added or name to be removed.

- Select *Summary of Eligibility Redetermination Information.* This form will include client information provided by the client during the data gathering interview. WFMS will create the packet separately from the FI2032 to be mailed the following day. The client is to review, sign, date and return the summary.

Comment: a.Outstanding item.

Steps	Redetermination Scheduled In-Office
	☐ Summary of Eligibility Redetermination Information • Click Save.
15.	Click on Correspondence in Left Navigation to **generate the FI 2032 and any additional forms**. **Take special care to verify that the deadline date is correct on the Create Correspondence Details page.** Refer to SEND NOTICE WORK INSTRUCTIONS IN VOLUME 7 COMMON PROCESSES – Section 3.11.4 (INSERT HYPERLINK) - TO: • VIEW CORRESPONDENCE HISTORY IN WFMS Section 3.11.4.7 (INSERT HYPERLINK) to view an FI-2032 created by Non-state Coalition staff. • CREATE CORRESPONDENCE IN WFMS Section 3.11.4.3 (INSERT HYPERLINK) to create the FI-2032, if necessary. • EDIT CORRESPONDENCE IN THE WFMS Section 3.11.4.8 (INSERT HYPERLINK) to edit/modify the deadline date of an FI-2032 created by Non-state Coalition staff, if necessary. • DELETE CORRESPONDENCE IN THE WFMS Section 3.11.4.9 (INSERT HYPERLINK) to delete an FI 2032 created by Non-state Coalition staff, if necessary. • REFER TO (INSERT HYPERLINK) PRINT CORRESPONDENCE IN SEND NOTICE WORK INSTRUCTIONS VOLUME 7 COMMON PROCESSES 3.11.4.6 for correspondence (FI-2032/Coversheet) that will be given directly to the applicant. Take special care to verify that the deadline date is correct on the Create Correspondence Details page. It may need to be modified. Remember to click on Edit on the Correspondence page and click on Pending Verification Hand Delivered on the Modify Correspondence Details page to avoid having WFMS mail the FI-2032. Volume 7 Common Processes – Section 3.11.4.6 Note: The first screen of Create Correspondence will allow the user to enter an additional address for third party correspondence or an alternative mailing address if the WFMS mailing address is not current. Refer to ICES for current mailing address.

Steps	Redetermination Scheduled In-Office
	Create Correspondence **CorrespondenceDetails – Addressee** Addressee Type: Third Party **If Address Type is Participant, select the Member Name** Addressee Name: **If Address Type is Third Party or Authorized Representative** Addressee Name: **Enter Address Details for Third Party or Authorized Representative. Information is optional for Pa** Address Line 1: Address Line 2: City: State: Zip: **Select The Participant This Correspondence Is In Regards To** Member Name: LAURA BUSH [Save] [Cancel] *Note: if an individual in the assistance group is IMPACT sanctioned and expresses the desire to cure their sanction, the user selected task "Intent to Cure" must be generated immediately to Arbor directing the task to the Arbor Area queue associated with the applicant's/recipient's REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE to create an additional General Use Document Cover Sheet to accompany the FI-2032 for the client to use when returning verification, if necessary.
16.	Print and review the Rights and Responsibilities form with the recipient and obtain signatures. REFER TO (INSERT HYPERLINK) SEND NOTICE WORK INSTRUCTIONS in Volume 7 Common Processes - Section 3.11.4.
17.	Inform the client the *Summary of Eligibility Redetermination Information* will be mailed separately from the FI 2032 the following day and once received to review, sign and return by the deadline date.
18.	Authorize the AG(s) if appropriate.
19.	Issue over the counter EBT card if appropriate. Refer to the EBT policy guide for instructions.
20.	In ICES, enter TRAN: CLRC PARMS: ICES Case Number.

Steps	Redetermination Scheduled In-Office
	NEXT TRAN: CLRC____ PARMS: 3000076384____ Enter case notes regarding the redetermination processing (following guidelines for entering information into CLRC).
21.	Create an Internal Cover Sheet marked "Image Only" to accompany any redetermination documents submitted that must be faxed immediately to the document center by the SEC. For Medicaid Disability Add-a-Program Applications/Progress Reports/Progress Reports processed during the Redetermination interview, REFER TO (INSERT HYPERLINK) Section 5.0 ADD A PROGRAM/AG APPLICATN KEEPS IN OFFICE SCHEDULED APPOINTMENT.
22.	Remember to close any task enacted upon. To do so, Click on *Close Task* on the *Task Home* page.
23.	Log applicant in as seen in screen on CSODA by entering "X" in the "S" (select) field.
24.	Go to CSOUU to enter the work ID of the interviewer.
25.	Assigned worker will need to note client as being seen by the entry of "Y" on CSOWL.

Steps	Redetermination Scheduled In-Office
|       | ```
CSOWL                    CLIENT SCHEDULING          07/23/07 08:38
                         WORKER WAITING LIST        97JCAR J TEST/CART

        WORKER ID: 97JCAR              NAME: JOAN      CON/CARTWRIGHT

              I
     SN  TIME  M  AC    IDENTIFIER    FIRST NAME      LAST NAME
     y   838   O  01    3000354625    SAMANTHA        JENKINS
``` |

7.0 Redetermination Scheduled In-Office (No Telephone)

Redetermination appointments will be scheduled at Local Offices for individuals who do not have a telephone. ACS Service Center staff will conduct the interview by calling the Local Office and speaking with the recipient and transfer the call to a SEC in the Service Center for the certification interview. All scheduled appointments for the Local Office are displayed on CSODA. Local Office staff should view CSODA periodically throughout the day as additional appointments may be added. Local Office staff must coordinate the incoming calls with the scheduled recipient(s).

Warm Transfer Not Completed:
If the warm transfer is not completed, the Eligibility Specialist will inform the client, they will need to speak to a State Eligibility Consultant in that office to complete the SEC interactive interview part of the process. Redetermination appointments scheduled at Local Offices for phone interviews and a warm transfer was not completed, the SEC will complete the interactive interview in the office. All scheduled appointments for the Local Office are displayed on CSODA.

If additional programs are requested at the Redetermination interview, refer to Section 5.0 ADD A PROGRAM/AG KEEPS IN OFFICE SCHEDULED APPOINTMENT (INSERT HYPERLINK),

Note: Every application must have a WFMS application case created.

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
1.	From the User Home page, find and select the case in WFMS. REFER TO (INSERT HYPERLINK) SEARCH Volume 7 Common Processes – Section 3.11.3

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
	 WFMS will display the Case Home page.
2.	From the search results, click on the appropriate case name. WFMS will display the Case Home page.
3.	From the *Case Home Page* in the WFMS,

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
	  Click *Documents* from the Left Navigation. Review all supporting documents, if any, submitted along with the application. If any supporting documents satisfy the verification requirement, remember to enter the appropriate information and verification code in ICES during the interview. The WFMS will navigate to the *Documents Page*.
4.	From the *Documents* page click view to see the document's details.

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
5.	Within the *View Document Details* screen click the document name hyperlink to view the document itself, take appropriate action in ICES.

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
	  Click on close. The WFMS will navigate back to the *Documents Page*.
6.	Search for any additional tasks related to the case that may be outstanding. From the *Documents Home* page click on *Tasks* from the Left Navigation.

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
7.	The WFMS will navigate to the *Tasks* page. Take note of any outstanding tasks that may need to be addressed. Selecting a task listed to a queue in which you are assigned will reserve that task in your ID to be worked, closed or parked. Navigate back to the *Case Home* page by clicking on *Home* in the Left Navigation.

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
8.	Complete the Interactive SEC Interview Guide and attach it to the case in WFMS. REFER TO (INSERT HYPERLINK) CREATING AN ATTACHMENT FROM THE FILE SERVER Volume 7 Section 3.11.4.12, Steps 1 - 12.
9.	From the *Case Home Page*, under the *Options* cluster, click *Initiate Data Broker*. Initiate Data Broker *NOTE: Data Broker not available for Pilot.*

10.	If necessary, reference Volume 7 Common Processes – Section 3.11.1.8
	to create and forward any of the tasks that are necessary for processing the application:
	
	   c. Suspected Fraud Referral
	
	   d. Asset/Trust Review Requested
	
	   c. Systematic Alien Verification Entitlement (SAVE) Request

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
11.	Review ICES screen AEWAA. Evaluate the reason codes for potential eligibility.
12.	Review all budget results with the recipient. Review ICES screen AEPND with the recipient to evaluate missing information and/or verification(s) outstanding, if any. *Enter TRAN: AEPND; PARMS: ICES Case Number.* AEPND PENDING DATA FOR ELIGIBILITY DECISIONS 07/09/07 14:41 COUNTY: 49 CASE: 3000347793 WORKER: T49704 T49704 A TEST/ROGER LAST ACTIVITY DATE: 07/09/07 STATUS: PENDING INDIVIDUAL SCREEN INCOMPLETE INFORMATION ------------ ------ ------------------------------- 01 MEDIC D AEIDP PROOF OF MA DISABILITY
13.	Once the missing or incomplete information is identified in ICES with question marks, modify the Pending Verification Checklist located in the WFMS case, if necessary. Note: The most current Pending Verification checklist will auto populate the FI 2032.

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
	TO MODIFY THE PENDING VERIFICATION CHECKLIST:
	• Click on Pending Verification Checklist in Left Navigation.
	• WFMS will navigate to Pending Verification Checklist.
	• Click on Edit at the bottom of the Current Checklist.
	• The Current Checklist will display
	• Click on any item(s) that are needed to add or remove.
	• Click on the name of client to whom the item pertains. Note: **Ctrl Click** To add more than one member per item or to remove a member, the ctrl button on the keyboard needs to be pressed while clicking on the additional name to be added or name to be removed.
	• Select *Summary of Eligibility Redetermination Information.* This form will include client information provided by the client during the data gathering interview. WFMS will create the packet separately from the FI2032 to be mailed the following day. The client is to review, sign, date and return the summary.
	• ☐ Summary of Eligibility Redetermination Information
	•
	• Click Save.
14.	To generate the FI 2032 and any additional forms REFER TO (INSERT HYPERLINK) SEND NOTICE Volume 7 Common Processes – Section 3.11.4 - TO:
	• VIEW CORRESPONDENCE HISTORY IN WFMS to view an FI-2032 created by Non-state Coalition staff.
	• CREATE CORRESPONDENCE IN WFMS to create the FI-2032, if necessary.
	• EDIT CORRESPONDENCE IN THE WFMS to edit/modify the deadline date of an FI-2032 created by Non-state Coalition staff, if necessary.
	• DELETE CORRESPONDENCE IN THE WFMS to delete an FI 2032 created by Non-state Coalition staff, if necessary.
	REFER TO (INSERT HYPERLINK) PRINT CORRESPONDENCE IN SEND NOTICE VOLUME 7 COMMON PROCESSES 3.11.4.6 for correspondence that will

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
	be given directly to the applicant (Use the Save and Print feature. Remember to go to Edit Correspondence and click on Pending Verification Hand Delivered to avoid having the WFMS mail a copy of the FI-2032). **Take special care to verify that the deadline date is correct on the Create Correspondence Details page.**
	Volume 7 Common Processes – Section 3.11.4.6
	Create Correspondence
	CorrespondenceDetails - Addressee
	Addressee Type: Third Party
	If Address Type is Participant, select the Member Name
	Addressee Name:
	If Address Type is Third Party or Authorized Representative
	Addressee Name:
	Enter Address Details for Third Party or Authorized Representative. Information is optional for Pa
	Address Line 1:
	Address Line 2:
	City:
	State:
	Zip:
	Select The Participant This Correspondence Is In Regards To
	Member Name: LAURA BUSH
	Save Cancel
	REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE Section 3.11.4.3 to create an additional General Use Document Cover Sheet to accompany the FI-2032 for the client to use when returning verification, if necessary.
15.	Print and review the Rights and Responsibilities form with the recipient and obtain signatures. REFER TO (INSERT HYPERLINK) SEND NOTICE WORK INSTRUCTIONS in Volume 7 Common Processes - Section 3.11.4.
16.	Authorize the AG(s) if appropriate.
17.	Issue over the counter EBT card if appropriate. Refer to the EBT policy guide for instructions.
18.	In ICES, enter TRAN: CLRC PARMS: ICES Case Number.
	NEXT TRAN: CLRC____ PARMS: 3000076384____
	Enter case notes regarding the redetermination processing (following guidelines for

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed
	entering information into CLRC).
19.	Create an Internal Cover Sheet marked "Image Only" to accompany any redetermination documents submitted that must be faxed immediately to the document center by the SEC. For Medicaid Disability Add-a-Program Applications/Progress Reports/Progress Reports processed during the Redetermination interview, REFER TO (INSERT HYPERLINK) Section 5.0 ADD A PROGRAM/AG APPLICATN KEEPS IN OFFICE SCHEDULED APPOINTMENT.
20.	Remember to close any task enacted upon. To do so, Click on *Close Task* on the *Task Home* page.
21.	Log applicant in as seen in screen on CSODA by entering "X" in the "S" (select) field.
22.	Go to CSOUU to enter the work ID of the interviewer.
23.	Assigned worker will need to note client as being seen by the entry of "Y" on CSOWL.

Steps	Redetermination Scheduled In-Office (No Telephone) – Warm Transfer Not Completed

8.0 Drop Box Procedures

Local Offices must adhere to the following procedures for date stamping information left in a local office drop box from a client and/or others. This includes, but is not limited to verifications, applications and hearing requests. This allows for a consistent procedure to follow when processing cases and performing other duties.

1. The drop box should be emptied immediately every morning at a specified time of no later than 8 A.M. and the date of receipt is considered to be the previous business day. If the drop box is opened on Monday morning and the office was closed on the previous Friday, the receipt date would be considered Thursday. Whatever information was left in the drop box that is emptied immediately in the morning should have the previous business date stamped on the information.

2. If the drop box information cannot be date stamped at the time it is emptied, it shall be placed in a container to be date stamped later in the day. A note shall be left on top of all of the drop box information with the date that is to be stamped.

3. If the drop box is emptied at other times later in the day after the initial time, then the date stamp shall be that business day. If this information cannot be date stamped at the time it is emptied, follow instructions in item 2.

4. No exceptions are allowed for opening the drop box late for the initial time in the morning. It must be emptied immediately every morning at a specified time of no later than 8 A.M. to provide a consistent receipt date of information and good customer service.

5. After the information has been appropriately date stamped, the SEC will fax to the Document Center the received information with a Document Transfer Cover Sheet on top.

Steps	Drop Box Procedures
1.	Find the application or case in WFMS and select the application/case. WFMS will display the Application or Case Home page. REFER TO (INSERT HYPERLINK) SEARCH Volume 7 Common Processes – Section 3.11.3 Note: If no application or case can be found in the WFMS, mail the document(s) to the Document Center. Remember, all documents received together and/or corresponding to one application/case must be contained in a separate envelope and the exterior of the envelope date stamped with the received date. Separate smaller envelopes may be placed in a larger envelope for mailing purposes to the document center.
2.	From the Case Home page click on the button entitled Internal Cover Sheet to print a Document Transfer Cover Sheet.
3.	Complete and fax the "Document Transfer Cover Sheet" and all received information from the drop box to the Document Center with the "Document Transfer Cover Sheet" on top..
4.	Return to the applicant/recipient all original documentation/information or documents

Steps	Drop Box Procedures
	specifically requested to be returned.

9.0 Voter Registration

Steps	Voter Registration
1.	The Local Office Voter Registration Coordinator will act as a liaison between the Local Office and all other internal and external parties involved in voter registration activities.
2.	The liaison will establish and maintain a supply of registration forms, collect completed forms from staff and transmit them weekly to the County Clerk or County Election Board.
3.	The opportunity to register to vote should be offered at initial application, recertification, and when a change of address is reported for TANF, Food Stamps, and/or Medicaid/Hoosier Healthwise. Complete Section M on the hard copy application prior to submitting. **Section M: Voter Registration** Would you like to register to vote? ☐ Yes ☐ No Checking 'Yes', 'No', or leaving this question blank will not affect your receipt of benefits. Check "Yes" if you would like to register to vote or update your voter registration information. If you check "No" or do not check a box, you will be considered to have decided not to apply to register to vote or update your voter registration information.

4.	Registration duties include but are not limited to:
	1. Provide voter registration forms to all individuals who wish to register
	2. Assist individual with the completion of registration forms
	3. Check registration forms for legibility and completeness
	4. Document an applicant/recipient's declination to register
	5. Inform registrant that he/she will receive a mailing regarding his/her registration form from the Circuit Court Clerk or Board of Registration
	6. Collect all registration and declination forms and deliver to the Circuit Court Clerk or Board of Registration weekly.
	   a. If the forms are hand delivered, the clerk or registration board shall provide a receipt for the forms stating the date and time of delivery and the printed name and signature of the person receiving the forms.
	   b. If the forms are mailed, certified mail should be used requesting a return receipt

5.	The Voter Registration form may also be accessed from http://intranet.fssa.in.gov/forms.htm

10.0 Homeless Mail

Step	Homeless Mail
1.	For a recipient who has no fixed address, specific arrangements must be made with him regarding the issuance of his FSSA correspondence. FSSA correspondence will be mailed to the address specified by the recipient, such as: The local office; A friend or relative; Social service agency; Church; or If the local office is chosen, the FSSA correspondence will be sent to the respective FSSA Local Office or Help Center.
2.	A designated <u>SEC</u> will hold the duty of securing the mail and maintaining it in an appropriately secured location (recall, the mail will include loaded EBT cards) |